

UTILITY PATENT APPLICATION TRANSMITTAL
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First Named Inventor or Application Identifier Beaudoin et al.

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APPLICATION ELEMENTS

See MPEP chapter 600 concerning utility patent application contents.

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(Submit an original, and a duplicate for fee processing)
2. X Specification (Total Pages)
(preferred arrangement set forth below)
 - Descriptive Title of the Invention
 - Cross References to Related Applications
 - Statement Regarding Fed sponsored R & D
 - Reference to Microfiche Appendix
 - Background of the Invention
 - Brief Summary of the Invention
 - Brief Description of the Drawings (if filed)
 - Detailed Description
 - Claims
 - Abstract of the Disclosure
3. X Drawings(s) (35 USC 113) (Total Sheets 12)
4. Oath or Declaration/Power of Attorney (Total Pages)
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 - b. Copy from a Prior Application (37 CFR 1.63(d))
(for Continuation/Divisional with Box 17 completed) (**Note Box 5 below**)
 - i. DELETIONS OF INVENTOR(S) Signed statement attached deleting inventor(s) named in the prior application, see 37 CFR 1.63(d)(2) and 1.33(b).
5. Incorporation By Reference (useable if Box 4b is checked)
The entire disclosure of the prior application, from which a copy of the oath or declaration is supplied under Box 4b, is considered as being part of the disclosure of the accompanying application and is hereby incorporated by reference therein.
6. Microfiche Computer Program (Appendix)
7. Nucleotide and/or Amino Acid Sequence Submission
(if applicable, all necessary)
 - a. Computer Readable Copy
 - b. Paper Copy (identical to computer copy)
 - c. Statement verifying identity of above copies

ACCOMPANYING APPLICATION PARTS

8. ☐ Assignment Papers (cover sheet & documents(s))
9. ☐ 37 CFR 3.73(b) Statement (where there is an assignee)
10. ☐ English Translation Document (if applicable)
11. ☐ a. Information Disclosure Statement (IDS)/PTO-1449
☐ b. Copies of IDS Citations
12. ☐ Preliminary Amendment
13. ☒ Return Receipt Postcard (MPEP 503) (Should be specifically itemized)
14. ☐ a. Small Entity Statement(s)
☐ b. Statement filed in prior application, Status still proper and desired
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Title: Facilitating Commerce Among Consumers and Service Providers by Matching Ready-to-Act Consumers...
BSTZ File No.: 004156-P001 Atty./Secty Initials: SMADIA-J/hss
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IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

TITLE OF THE INVENTION

**FACILITATING COMMERCE AMONG CONSUMERS AND SERVICE PROVIDERS BY
MATCHING READY-TO-ACT CONSUMERS AND PRE-QUALIFIED SERVICE PROVIDERS**

INVENTORS

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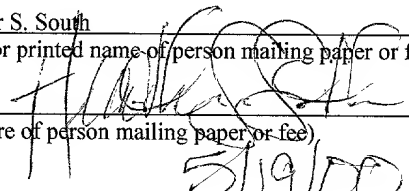
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**FACILITATING COMMERCE AMONG CONSUMERS AND SERVICE PROVIDERS BY
MATCHING READY-TO-ACT CONSUMERS AND PRE-QUALIFIED SERVICE PROVIDERS**

5 This application claims the benefit of U.S. Provisional Application No.
60/135,522, filed 5/21/99.

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BACKGROUND OF THE INVENTION

15 Field of the Invention

 The invention relates generally to the field of Consumer-to-Business commerce.
More particularly, the invention relates to a method and apparatus for facilitating
commerce among consumers and service providers.

20 Description of the Related Art

 The local service economy is dominated by inefficiency. Many factors contribute
to this inefficiency. For example, consumers have difficulties identifying appropriate
service providers to meet their needs; and consumers cannot readily distinguish relative
service provider quality. In addition, there is an inherent knowledge gap between
25 consumers and service providers. Consequently, consumers and service providers
experience difficulty communicating with one another. Furthermore, the ability to create
a competitive marketplace is hindered by the consumers' inability to easily identify and
communicate with multiple service providers.

BRIEF SUMMARY OF THE INVENTION

A method and apparatus are described for matching ready-to-act consumers and pre-qualified service providers. According to one aspect of the present invention, the Internet is used to attempt to solve communications problems and to achieve efficiency in Consumer-to-Business commerce transactions. Initially, a database of pre-screened service providers is established. Then, a description of the consumer's service needs may be extracted from a consumer using decision trees appropriate for the desired task. This experience may be enhanced by the provision of targeted, relevant information that provides education in context for the consumer. Subsequently, the consumer needs are packaged and presented to multiple service providers that meet a set of predetermined qualifications. The consumer needs may be presented, for example, by way of a set of heterogeneous communication devices depending upon preferences supplied by the service providers. The service providers may choose to submit a quote for the consumer's needs, indicate a desire to be referred, or reject the task. Importantly, according to one embodiment, the system works in a persistent manner to secure responses from an appropriate number of service providers. After a sufficient number of responses have been received from the pre-qualified service providers, they are presented to the consumer. The consumer may then select from the pre-qualified service providers based upon one or more objective and/or subjective factors associated with the pre-qualified service providers. Such objective and subjective information may be collected by the system and presented to consumers.

According to another aspect of the invention, the system may automatically initiate follow-up communications with the consumers and service providers to collect

1. Introduction

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BRIEF DESCRIPTION OF THE DRAWINGS

The appended claims set forth the features of the invention with particularity. The invention, together with its advantages, may be best understood from the following detailed description taken in conjunction with the accompanying drawings of which:

Figure 1 is an example of a typical computer system upon which one embodiment of the present invention may be implemented.

Figure 2 is a block diagram illustrating the internet-based commerce facilitator platform according to one embodiment of the present invention.

Figure 3 illustrates exemplary end-to-end communications between consumers and service providers according to one embodiment of the present invention.

Figure 4 illustrates a service provider enrollment process according to one embodiment of the present invention.

Figure 5 illustrates a consumer pre-qualification process according to one embodiment of the present invention.

Figure 6 illustrates a consumer enrollment process according to one embodiment of the present invention.

Figure 7A illustrates exemplary consumer interactions with the commerce facilitator platform according to one embodiment of the present invention.

Figure 7B illustrates exemplary service provider interactions with the commerce facilitator platform according to one embodiment of the present invention.

Figure 8 illustrates a matching process according to one embodiment of the present invention.

Figure 9 illustrates a quality seal process according to one embodiment of the present invention.

5 **Figure 10** illustrates services and tools available for consumers' use.

Figure 11 is a block diagram illustrating interactions among various components/processes according to one embodiment of the present invention.

DETAILED DESCRIPTION OF THE INVENTION

A method and apparatus for matching ready-to-act consumers and pre-qualified service providers are described. Broadly stated, according to the present invention,

5 Consumer-to-Business commerce transactions are sought to be facilitated by pre-qualifying both consumers and service providers and matching consumers with pre-qualified service providers. For example, according to one embodiment of the present invention, using information provided by the consumer, such as the consumer's address, schedule, cost expectations, etc., a set of pre-qualified service providers may be identified
10 for solicitation of responses, e.g., quotes or referrals. These and other features seek to provide a powerful and flexible Consumer-to-Business commerce facilitator solution.

In the following description, for the purposes of explanation, numerous specific details are set forth in order to provide a thorough understanding of the present invention. It will be apparent, however, to one skilled in the art that the present invention may be
15 practiced without some of these specific details. In other instances, well-known structures and devices are shown in block diagram form.

The present invention includes various steps, which will be described below. The steps of the present invention may be performed by hardware components or may be embodied in machine-executable instructions, which may be used to cause a general-
20 purpose or special-purpose processor or logic circuits programmed with the instructions to perform the steps. Alternatively, the steps may be performed by a combination of hardware and software.

The present invention may be provided as a computer program product which may include a machine-readable medium having stored thereon instructions which may be
25 used to program a computer (or other electronic devices) to perform a process according

to the present invention. The machine-readable medium may include, but is not limited to, floppy diskettes, optical disks, CD-ROMs, and magneto-optical disks, ROMs, RAMs, EPROMs, EEPROMs, magnet or optical cards, flash memory, or other type of media / machine-readable medium suitable for storing electronic instructions. Moreover, the
5 present invention may also be downloaded as a computer program product, wherein the program may be transferred from a remote computer (e.g., a server) to a requesting computer (e.g., a client) by way of data signals embodied in a carrier wave or other propagation medium via a communication link (e.g., a modem or network connection). Accordingly, herein, a carrier wave shall be regarded as comprising a machine-readable
10 medium.

An Exemplary Computer System

Figure 1 describes a computer system 100 representing an exemplary target system upon which features of the present invention may be implemented. Computer system 100 comprises a bus or other communication means 101 for communicating information, and a processing means such as processor 102 coupled with bus 101 for processing information. Computer system 100 further comprises a random access memory (RAM) or other dynamic storage device 104 (referred to as main memory), coupled to bus 101 for storing information and instructions to be executed by processor 102. Main memory 104 also may be used for storing temporary variables or other intermediate information during execution of instructions by processor 102. Computer system 100 also comprises a read only memory (ROM) and/or other static storage device 106 coupled to bus 101 for storing static information and instructions for processor 102.

A data storage device 107 such as a magnetic disk or optical disc and its corresponding drive may also be coupled to computer system 100 for storing information and instructions. Computer system 100 can also be coupled via bus 101 to a display device 121, such as a cathode ray tube (CRT) or Liquid Crystal Display (LCD), for displaying information to an end user. For example, graphical and/or textual indications of installation status, time remaining in the trial period, and other information may be presented to the prospective purchaser on the display device 121. Typically, an alphanumeric input device 122, including alphanumeric and other keys, may be coupled to bus 101 for communicating information and/or command selections to processor 102. Another type of user input device is cursor control 123, such as a mouse, a trackball, or cursor direction keys for

communicating direction information and command selections to processor 102 and for controlling cursor movement on display 121.

A communication device 125 is also coupled to bus 101. The communication device 125 may include a modem, a network interface card, or other well-known interface devices, such as those used for coupling to Ethernet, token ring, or other types of physical attachment for purposes of providing a communication link to support a local or wide area network, for example. In any event, in this manner, the computer system 100 may be coupled to a number of clients and/or servers via a conventional network infrastructure, such as a company's Intranet and/or the Internet, for example.

It is appreciated that a lesser or more equipped computer system than the example described above may be desirable for certain implementations. Therefore, the configuration of computer system 100 will vary from implementation to implementation depending upon numerous factors, such as price constraints, performance requirements, technological improvements, and/or other circumstances.

It should be noted that, while the steps described herein may be performed under the control of a programmed processor, such as processor 102, in alternative embodiments, the steps may be fully or partially implemented by any programmable or hardcoded logic, such as Field Programmable Gate Arrays (FPGAs), TTL logic, or Application Specific Integrated Circuits (ASICs), for example. Additionally, the method of the present invention may be performed by any combination of programmed general purpose computer components and/or custom hardware components. Therefore, nothing disclosed herein should be construed as limiting the present invention to a particular

embodiment wherein the recited steps are performed by a specific combination of hardware components.

Platform Overview

According to one embodiment, as shown in **Figure 2**, an internet-based platform, the commerce facilitator platform 205, is provided that supports the US local service economy and facilitates commerce between Consumers 202 and Service Providers 204. Specifically, in this example, a robust information environment is provided that brings Consumers 202 and Service Providers together 204, facilitating efficient identification of appropriate and pre-qualified Service Providers 204, supports more efficient communications, and provides a competitive environment where Consumers 202 can easily comparison shop based on full services quotes and subjective consumer ratings and reviews of local Service Providers 204.

The Internet-based commerce facilitator platform website 205 is a common platform, generated by the Host 201, provides all the facilities for the consumers 202 and the service providers 204 to do business. Both the consumers 202 and the service providers 204 can access the website using their preferred Internet service providers 203, such as America On-line and CompuServe.

The commerce facilitator platform 205 assists Consumers 202 in identifying their need (and potentially troubleshooting), by bringing reliable qualitative information regarding Service Providers 204 to them, and facilitating a competitive environment by enhancing the Consumer-to-Service Provider communication process such that seeking multiple quotes is convenient.

In addition, the commerce facilitator platform 205 includes a value proposition for Service Providers 204 that delivers efficiency to their business by delivering Consumers

202 with specific service needs, streamlining the sales process, facilitating smooth and accurate communications, and reducing reliance on onsite physical review for estimating and quoting potential projects. The commerce facilitator platform 205 will bring ready-to-act Consumers 202 to the right Service Providers 202 in an efficient manner, thereby
5 reducing marketing and estimating costs.

With this type of model, revenues may be generated from one or more of the following: (i) charging participating Service Providers 204 a commission on revenues attributable to referrals or quotes facilitated by the commerce facilitator platform 205; (ii) membership fees paid by either Consumers 202 or Service Providers 204 or both; (iii)
10 selling advertising and promotional opportunities available through its web site and targeted consumer traffic; (iv) providing business services to Service Providers 204, such as communications and web services (non-commerce facilitator platform answering/paging service; web site development & hosting; on-line merchant account facilitation; bill presentment/payment; etc.), and (v) offering value-added services to its Consumers
15 202.

Figure 3 illustrates exemplary end-to-end communications between consumers and service providers according to one embodiment of the present invention. Initially, a database of pre-screened service providers is established, based on the information received during the pre-qualification process 310. Similarly, another database is
20 established, based on the information provided by the consumers during an interactive question and answer interview session 320. Consumer needs are then packaged and provided to multiple service providers 330. Service providers' responses are then forwarded to individual consumers, so they can decide whether to sign up for the service

340. An automatic follow-up communication is then initiated to receive service confirmation and feedback from the consumers and the service providers 350.

Service Provider Enrollment Process (SPEP)

Figure 4 illustrates the Service Provider Enrollment Process 400, according to one embodiment of the present invention, which is essential for the pre-qualification process and for creating the database of pre-screened service providers. Either upon “first access” of the service, or when the service provider makes a decision to participate in the service and be eligible for inclusion in the Consumer-driven Service Request (CSR) Process, the service provider is required to enroll, providing certain basic information 410, such as business name, address and number of years in operation. The system may require additional preference information 420 to support the most effective CSR matching process. The enrollment process then initiates the creation of a unique Service Provider Profile 430 for each service provider. In alternative embodiments, other methods of service provider enrollment may be employed, such as live telephone operator, email, and/or fax forms.

Website Personalization. The service providers have the capability to “personalize” their website home page once they have been properly enrolled 440. Their preferences could include a summary of past services referred or quoted through the service, a status of current CSR available to the service provider, etc.

CSR Response Process. The service providers are then notified of projects that have been submitted to the service for which the service provider is eligible 450. The service provider indicates an initial “Yes” or “No” with regard to their interest, and ultimately may submit a “quote” or further confirmation of interest for a “referral”. The

responses are developed and formatted based on a template to ensure consistency and comparability.

Service Provider Recognition. Once a Service Provider has enrolled, he/she may be recognized upon return to the website 460. Service Providers may enter an earlier set
5 “password” to ensure service provider identification.

Process Tracking/Update. Upon entry into the web site by an enrolled user, a standard “window” within the web site, whether generic or personalized, may summarily present service provider-specific status information on all active CSRs.

10 Referred Prospect Profile (“RPP”)

As an additional feature, the basic contact information (e.g. business name, contact name, address, telephone, e-mail) is entered by the referring service provider, creating a Referred Prospect Profile. The pieces of this information (e.g. business name) may be used as key words supporting automated searches of online or offline databases to
15 enhance the RPP. Any search results may be imported into the RPP.

Based on the information in the RPP, the commerce facilitator may either (i) launch a pre-formatted, semi-customizable (include name of referring Service Provider) communication via one of multiple mechanisms, including fax, e-mail and/or physical mail delivery (this could be fulfilled through a third-party, so delivery of the pertinent
20 contact information via an electronic method would be required), or (ii) initiate a telemarketing or direct sales effort to the Referred Prospect.

The results of the referral process may be tracked by referring the service provider. Participating service providers may be encouraged to provide referrals by offering certain awards, sweepstakes or other economic consideration.

To either (i) ensure that prospective service providers are qualified to participate in the service or (ii) provide additional information to Consumer users to improve their overall decision-making confidence, referring service providers may be asked to complete a Peer Rating & Review process similar to that completed by consumers.

5

Pre-Qualification Process.

Figure 5 illustrates a Pre-Qualification Process 500 according to one embodiment of the present invention. Briefly, the Pre-Qualification Process 500 may be executed for each enrolling service provider. It may review certain objective criteria and capture the relevant information in the Service Provider Profile. This process 500 optimally will be automated; however, certain information components may require manual input.

The Pre-Qualification Process 500 begins with reviewing the objective criteria and capturing relevant information in the service provider profile 510. Next, the request to obtain licensing information is submitted to the relevant licensing body 520. Where feasible, the commerce facilitator system automatically submits a request for licensing confirmation to the relevant licensing body, or scan an online database 520. This request will ideally be electronic; however, if the relevant body does not support electronic request, then a pre-formatted (including specific information from the Service Provider Profile) fax may be sent or a manual (telephone) inquiry may be prompted.

Once the licensing information is obtained 520, the system submits a request to obtain information regarding insurance coverage 530. Where feasible, the system automatically submits a request for insurance coverage confirmation to the relevant insurance company indicated through the SPEP and resident in the Service Provider Profile 530. This request will ideally be electronic; however, if the relevant insurance

company does not support electronic request, then a pre-formatted (including specific information from the Service Provider Profile) fax may be sent or a manual (telephone) inquiry may be prompted. If the insurance carriers require the confirmation request to be initiated by the service provider, then the service may provide a pre-formatted request for submission by the service provider with reply directly to the Company.

The system then submits a request to obtain business credit status 540. Where feasible, the system may also automatically submit a request for business credit status to one or more third-party agencies based on information resident in the Service Provider Profile 540. This request, and the third-party agency's response, will be electronic. The choice of third-party agency may be driven by industry/service sector (using NAICS, for example), geography, random rotation, etc.

Additionally, the system submits a request to obtain information regarding legal and bankruptcy review 550. Where feasible, the system may automatically submit a request for legal and bankruptcy review to the relevant state's Attorney General's Office based on information resident in the Service Provider Profile 550. This request will ideally be electronic; however, if the relevant Attorney General's Office does not support electronic request, then a pre-formatted (including specific information from the Service Provider Profile) fax may be sent or a manual (telephone) inquiry may be prompted.

Certain agencies, consumer groups and associations capture information on businesses, based on consumer feedback, usually negative. The system will request such negative information from relevant agencies or groups 560. Where feasible, the system may automatically submit a request to the relevant agency or group based on information resident in the Service Provider Profile 560. This request will ideally be electronic; however, if the relevant Group does not support electronic request, then a pre-formatted

(including specific information from the Service Provider Profile) fax may be sent or a manual (telephone) inquiry may be prompted.

During the SPEP the prospective service provider participants may be required to submit basic contact information for references (e.g. XX customers from last year of business). These references can then be contacted via e-mail, physical mail or telephone and questioned regarding the performance of the specific service provider, likely utilizing the Rating & Review Process 570.

Consumer Enrollment Process (CEP)

Figure 6 illustrates a Consumer Enrollment Process 600 according to one embodiment of the present invention. Either upon “first access” or upon submission of their first service request, the consumer can be prompted to “enroll.” The first step of the Enrollment Process 600 involves capturing basic information on consumers 610. Next, the Process 600 creates a unique Consumer Profile for each consumer 620.

Website Personalization. The Process 600 then provides consumers the option of personalizing the website to meet their specific preferences 630. The system then develops an over design theme for the website within the context of metaphorical scheme, such as home 640. The consumers are then provided a complete listing of, but not limited to, participating service providers with searching capability by categories, such as geography, service category and rating score 650.

Consumer Recognition. Once a consumer has enrolled, he/she may be recognized upon return to the website 660. The service may also recognize Consumer geographic origin even before they have enrolled, thereby allowing geo-sensitive content and other features to adjust accordingly.

006 T 50 606 H 2 560

The consumer may be presented with a basic listing of service categories, perhaps through a multi-tiered mechanism (e.g. cleaning – to – power washing or house cleaning). If the consumer cannot determine the appropriate service category, the CSR may accept descriptive input on the service need, cross reference a knowledge management database, and present additional questions to guide the consumer into the correct service category. As indicated above, the objective of the CSR Process is to create a detailed description of the service need for presentation to service providers. This description preferably includes measurements, product identifiers, desired solutions, etc.

Interactive Interviews. As the consumer narrows the alternatives that describe the service need, indications or choices by the consumer lead them to a new set of alternatives and choices. Hence, the interactive question and answer interview provides a detailed description of the consumer's service needs.

Measurement Templates. Many service needs are measurable (e.g. square footage for flooring, linear footage for fencing etc.). Consumers will be presented with the appropriate template for the desired service need.

Visual References. Throughout the user's interaction with the CSR, where useful for facilitating the description, the consumer may be presented with visual images (photos; drawings; etc.) to ease identification and guide the consumer down the appropriate path to a correct service need description.

Commerce Facilitator Platform

As described earlier, the commerce facilitator platform brings together consumers and service providers by matching consumer needs to service providers' capabilities. The commerce facilitator platform facilitates efficient identification of the appropriate and

pre-qualified service providers and supports more efficient communications. The commerce facilitator platform also provides a competitive environment, by providing reliable qualitative information about the service providers to the consumers, and by enhancing the consumer-to-service provider communication process such that seeking multiple quotes is convenient.

According to one embodiment, as illustrated in **Figure 7A**, a consumer 750 can access the a website associated with the commerce facilitator platform 751 to (1) identify and connect with service providers to fulfill their local service needs 752; (2) access content relevant to these needs 753; (3) utilize various value-added offerings related to their fundamental local service needs 754; (4) after initiation of a service request, track the status of these requests 755; and (5) access their Consumer Profile and change preferences 756. According to this example, consumers can access the commerce facilitator platform through a website supported by generally available browser technology.

The website is designed to be functional, compelling and intuitive, with creative metaphors appropriate for the service being offered. Logical paths will guide the consumer through the services offering. The website may also offer users a variety of relevant and related content, such as service articles, and user generated content through discussion groups.

Figure 7B illustrates that a service provider 760 can access the website 761 to (1) enroll in the service 762; (2) review detailed information on available CSRs 763; (3) respond to CSRs 764; (4) track the status of active CSRs 765; and (5) access their Service Provider Profile and change preferences 766.

Like the consumers, service providers may access the commerce facilitator platform through a website supported by generally available browser technology. In addition, the service supports an array of offline communications mechanisms, both inbound and outbound, that enables service providers to participate when they are unable to gain online access.

Consumer-to-Service Provider Communications. Various business models are possible. According to one embodiment, the website may be employed during ongoing communications after a Quote or Referral List is delivered. For example, the web site may support ongoing communication, such as service scheduling. In this embodiment, the website home page may summarize pending communication from service providers (this may be in addition to direct e-mail messages sent to the consumer).

Advertising/Promotion Engine. The commerce facilitator platform may also include an engine to deliver advertising, such as banner ads, based on predetermined target specification such as user type, geographic location, subject category, or user demographic profile. In this manner, the website may sell advertising and promotion opportunities based on its attractive and targeted user profiles, including both consumers and service providers.

Security. The commerce facilitator platform and the information maintained in its extensive database, including Consumer and Service Provider Profiles, Rating & Review information, and past Service Transaction information, is preferably maintained in a secure fashion to ensure that there is no capability of tampering or general operational disruption.

Disaster Recovery/Mirroring. Because delivery of the service will be primarily
reliant on the commerce facilitator platform, preferably a high level of availability is
provided to maintain a basic level of operations. For redundancy and performance
reasons, the commerce facilitator platform may need to mirror its website and access to
its underlying database engines across multiple hosting sites or geographies.

Performance. Preferably, the commerce facilitator platform meets or exceeds user
expectations with regards to response time and accessibility by providing a robust,
scalable database solution that will support millions of consumer and service provider
users.

Matching Process

Figure 8 illustrates a Matching Process 800 according to one embodiment of the
present invention. The Matching Process 800 may use the information submitted by
service providers and consumers 800. The service providers submit information to a
database consisting of basic information, such as name, address and years in operation,
and some preference information, such as service types, geographic region and
communication mechanism 801. Using the information provided, a unique Service
Provider Profile is created for each service provider 802.

Screening. Certain information components within the Service Provider Profile
and the CSR are used as key matching components.

Once the CSR has been completed, the Consumer “submits” the CSR to the
Matching Process 803, or saves it in its current form for adding information later prior to
submittal (e.g. a specific measurement is required which mandates that the consumer

leave their computer). Additionally, the form may be printed for offline completion. A unique Consumer Profile is created for each consumer, using the CSR information 804.

A completed CSR that is ready for submittal includes one or more of the following (i) a thorough description of the service need or project, (ii) required completion date or time (if within 24 hours), and (iii) certain consumer preferences regarding the number of service provider quotes or referral and forms of communication. Of course, the more detailed the information is in the CSR, the more quotable the service need or project will be for service providers. Therefore, preferably, each of i-iii, above, are completed for each CSR.

Upon completion and submittal of a CSR, the Matching Engine may cross-reference key information components from the CSR, the Consumer Profile, and a corresponding table of key information components gleaned from the Service Provider Profile database to identify a group of eligible service providers for the specific CSR 805.

The service providers are then presented with sufficiently descriptive and detailed consumer-data based upon the CSR 806. Relying on the CSR information, the service providers acknowledge the CSR and confirm their interest in performing the service 807, by responding with quote or referral 808.

The Matching Process 800 then compiles a list of pre-qualified service providers who have shown interest in meeting the consumer's service needs. The screening process may include an Intuitive Predicting Method, where inferences regarding service providers are made based on historical observations, such as the past interactions with service providers 809. For instance, a service provider who is only interested in roofing jobs, as presented by his acceptance of all past such jobs, will be not be recommended for plumbing jobs. The Intuitive Predicting Method may also infer special skills needed by service providers based on the interview information provided by consumers. For

instance, if a consumer, seeking plumbing services, is located in a rural area, only those plumbers who have experience with wells be recommended.

Additionally, the Matching Process 800 may modify the list of service providers, by selecting service providers with the least number of recent service opportunities, creating a fair and balance distribution of jobs 810. The Process 800 also encourages service providers to quickly reply when a service is requested, as service providers replying promptly are given priority over others.

The consumers receive a communication from the Commerce Facilitator confirming receipt and summarizing the CSR, using the preferred communication mechanism 811. Additionally, the consumers receive a list of service providers, who have shown willingness to perform the requested service, with requested quotes or referrals 812.

Miscellaneous Service Requirements. The service also provides an area for posting miscellaneous service needs that are not specifically supported by the service, either because they do not as yet logically fall within a given service category or potentially because within that specific geographic region a certain category is not yet supported.

Rating & Review Process/Quality Seal.

Figure 9 illustrates a method of rating and reviewing the service providers using Quality Seal 900. The method includes compiling ratings and reviews regarding the service providers involved during the service transaction 910. Based on the quantitative ratings and qualitative reviews received from the consumers, each service provider is assigned a Quality Seal 920. The Quality Seal, which is updated in real-time, is provided to the consumers as part of the subjective information available to the consumers 930.

The Quality Seal will indicated the overall rating of a service provider using a defined rating system, such as the “star system,” where five stars is the highest rating and one star is the lowest, or the “medal system,” where gold medal is the highest rating and bronze medal is the lowest.

The consumers are requested to provide the rating information regarding the service providers, so that the Quality Seal can be assigned. For instance, upon completion of a service transaction that has been facilitated by the service, consumers may be asked, via e-mail, for example, to complete the R&R Process for the specific service provider(s) involved in their project.

Quantitative. The consumer will respond to one or more questions regarding the performance of the service provider based on a scale [1 – 5; A – E; etc.].

Qualitative. The consumer will be provided with an open text box to enter written comments on the Service Provider.

Services & Tools

The consumers are provided access to various services and tools. For instance, as shown in **Figure 10**, a consumer 1000 may access one or more of the following (1) Home Information Folder 1020; (2) Home Maintenance/Service Calendar 1030; (3) Personal Service Portfolio 1040; (4) Service Provider Management Tools 1050; and (5) User Support Process 1060. A brief description of these services and tools will now be provided:

Home Information Folder

Home Specifications. This area may provide pre-formatted inputs for home specifications that can be proactively populated by the user, automatically populated by the commerce facilitator over time via information collected via the CSR process, or

potentially imported via other information sources (e.g. MLS listing of recently sold home). Once entered, the information can be imported into future CSRs.

Past Services. The user can access the repository of their past service transactions (potentially including those purchased or performed via the prior owner = tracking by home site) and sort based on different filters (e.g. date of service; service cost; service category). For rental property owners, this feature will enable tracking of service by property within their portfolio.

Content File. Users may also have the ability to “save” content of interest for future reference (e.g. “10 Easy Repairs to Make Your Home Saleable”).

Home Maintenance/Service Calendar The Calendar, which will be specific to each enrolled user, will enable consumers to schedule future reminders or reference potential service events.

Pre-Loaded. Based on user information from the Consumer Profile (e.g. geography; home type; home age; etc.) or from the Home Specifications file (e.g. forced air heat; gravel driveway; etc.) certain events, reminders or suggestions may be pre-logged into the Calendar (e.g. Nov. in Northern cities = furnace servicing; April in FL = air conditioning servicing; etc.).

User Scheduled. The user also has the ability to add events and reminders to the calendar. These can be activated to launch e-mail reminders based on a prescribed notification time.

Past Services Driven. Certain events or reminders might be added based on past service transactions and industry accepted or recommended intervals (e.g. pest control every XX mos.; driveway resurfacing in Midwest every X years; etc.).

Personal Service Portfolio Depending on the range of local service economy sectors addressed by the service, users may want to categorize frequently used services, particularly if the service offers additional direct communications facilitation and scheduling (e.g. need to schedule pick-up by regular dry cleaner; onsite oil change service; etc.).

Service Provider Management Tools A variety of analysis tools may be provided to help the service provider better understand and manage their business.

Service Type Analysis. The service provider can access historical information on their service transactions, CSRs that were not consummated; blind profiles of other service providers from similar geography or service category and their performance, all of which could be presented to provide a better understanding of past performance and future opportunity.

Performance. Based on their ratings and reviews to date, the service may offer suggestions on ways to improve their performance and their ratings.

User Support Process

While the service is designed to be intuitive, there will necessarily be times when users, both consumers and service providers, need additional information, explanation and/or help. Additionally, certain circumstances may require intervention on behalf of a user to facilitate resolution of an issue, misunderstanding or dispute. Therefore, the commerce facilitator may provide a variety of mechanisms for users to access information or activate support.

1. Information Mechanisms. The web site may be designed from a navigation and user interface standpoint to provide the appropriate information at the appropriate place and time.

a) *FAQs*. The service may provide answers to a predictable list of questions (this list will evolve based on actual user feedback).

b) *Anticipatory Guidance*. The web site may anticipate potential user information needs based on site map location (this information will evolve based on actual user activity and feedback).

2. Support Mechanisms. The service offers users several alternative mechanisms for accessing customer support. Preferably, there will be a tiered offering of support alternatives that attempts to answer questions and resolve issues via the most efficient, user-friendly and economical means first, with a logical escalation driven by the complexity of the issue.

a) *Subject Sensitive "Help"*. The user can "ask for help" based on where they are is in the web site or underlying process.

b) *E-mail*. Users can submit questions or issues via e-mail and expect short-turnaround response.

c) *Online Chat*. Real-time support from a live operator may be provided via online chat (ICQ-like) technologies.

d) *Newsgroups/Discussion*. Users can share information regarding use of the system and post/reply specific questions.

e) *Telephone – Live Operator*. For the most complex issues and questions, the Company will provide access to a live operator via telephone.

Activity/Information Tracking. As users utilize different information and support mechanisms, the Platform will track their paths to determine common user issues that can be solved in future versions or enhancements.

Functional and Technical Overview

Figure 11 is a block diagram illustrating interactions among various components/processes of the system 1100 according to one embodiment of the present invention. According to one embodiment, the website 1102 supports, and is optimized for, generally available browser technology, such as Microsoft Internet Explorer and Netscape Navigator. Additionally, it may be desirable to optimize a version of the web application for use via high bandwidth internet service and/or for delivery via other web appliances (e.g. PDAs; etc.) – these may be used for all or a subset of the service functionality (e.g. service provider status review; initial response; etc.).

The user interface may be used to develop an overall design theme for the website 1102 within the context of a metaphorical scheme (e.g. home, etc.). The website 1102 will provide users with an intuitive, user-friendly navigation methodology that facilitates exploration or quick access to desired functionality depending on user preference.

As mentioned above, once a user 1101 has enrolled in the service, they are recognized upon return to the site (e.g., by name; geographic news/content; etc.). Additionally, the website 1102 may, over time, determine user patterns with regards to subject interest and navigation such that the website anticipates preferences and presents content likely to be of interest to the specific user.

Enrolled users 1101 will have the option to “personalize” the web site home page to meet their specific preferences (e.g. content subjects; use of value-added components; CSR history tables; etc.).

According to one embodiment, a Consumer Enrollment Process (CEP) captures basic information on the consumer, including:

- Name (First, Last, Middle)
- Home Owner/Renter

- Address, City, State, Zip
- Telephone (Day, Evening)
- E-mail Address
- Marital Status
- No. Children
- Unique Identifier
- Other Demographics (income; employment type; etc.)
- Anticipated Service Needs
- Home Description (from Choice List – check box)
- Home Value
- How Long in Home (pull down)
- Home Age
- Service Interests (from Choice List – check box)
- Rental Property Owner (Y/N)
- No. Properties
- Properties Type (# units)
- Same/Different Geography

A unique Consumer Profile 1103 is created using basic and preference information provided by the consumer. Certain basic information may be required for enrollment while other pieces may be optional. In the event that the enrollment form is completed incorrectly, the consumer is prompted to complete it correctly without having to re-enter all the information (i.e., a returned form will not be erased when re-presented to the enrolling consumer). The enrollment process may support multiple property locations for a single consumer user to accommodate second- or vacation-homes and/or multiple rental properties.

Augmented information regarding consumers for the Consumer Profile 1103 may be acquired from third-party services to provide demographic information on enrolled consumers to augment the Consumer Profile 1103. For example, some component of the

basic information may be delivered to the third-party service (e.g. address) to drive the demographic information retrieval process. In this manner, one or more files of information may be received from the third-party service with the enhanced demographics, which can then be incorporated into the Consumer Profile 1103.

- 5 Additional consumer preferences may be established upon enrollment. Consumers can change these preferences from time to time by accessing their Consumer Profile 1103.

After a service provider has decided to enroll in the service they are directed to the Service Provider Enrollment Process (SPEP). The SPEP preferably captures basic
10 information on the service provider, including:

- | | |
|--|---|
| • Business Name | • Insurance Carrier |
| • Address, City, State, Zip | • Insurance Coverages |
| • Telephone (Day, Evening) | • Service Interests (from Choice List – check box) |
| • E-mail Address | • Licensing Information |
| • Contact/Owner Name (First, Last, Middle) | • Activate/De-Activate Status |
| • Years in Operation | • Credit Information (e.g. Bank; Industry references) |
| • Annual Revenues | • Referring Member |
| • No. Employees | |
| • Unique Identifier | |

In addition, to support the most effective the Matching Process, the commerce facilitator system will collect additional preference information from each service providers, such as service types, geographic region of operation, service response and

fulfillment time, preferred communication mechanism, etc. A unique Service Provider Profile 1104 is created using basic and preference information provided by the service provider.

With regard to service type, service providers may indicate the types of service transactions for which they would like to be considered. The preference input process preferably recognizes a discontinuity of types of service transactions (e.g. dry cleaning and plumbing) and may limit the absolute number of category types.

The service provider will indicate the type of CSRs they are interested in seeing such as Quote versus Referral and requested Response or Fulfillment Time (e.g. emergency/quick turn-around; long-lead time; no constraints; etc.).

Service providers may indicate their preferred communication mechanism and have the ability to change these Preferences at any time by accessing their Profile.

During the SPEP, the enrolling service provider may be encouraged to identify potential Service Provider participants that can be contacted regarding the service (“Referred Prospects”). This process preferably captures enough information to enable a communication to be launched to the Referred Prospect. The commerce facilitator system may also track these referral leads to determine conversion and enrollment rates and to note such in the referring Service Provider’s Profile. This information may drive economic remittance or “chits” for a contest or sweepstakes.

Post-Matching Process Communication

Upon completion of the Matching Process, a set of qualified service providers is identified 1107 that are eligible to quote or be referred to the consumer. These service providers typically acknowledge their interest and/or formally respond to the CSR; such response form and mechanism may vary depending on the nature of the CSR.

In the event where the CSR is sufficiently descriptive and detailed so that the service provider can submit a formal quote based solely on that information, the service, assuming that the consumer has indicated a preference for a quote, (i) indicates that a quote is preferred and (ii) provides a templated form for the quote that is specific to the CSR (e.g. appropriate units (sq. footage), included products, etc.).

A qualified service provider who indicates an interest in being referred may also want to provide supplemental information for the consumer. This could include a simple link to their web site or a detailed review of past service fulfillment specifically related to the CSR at hand.

Analysis may then be performed on the submitted responses, ensuring that all required information is included and service providers may be prompted to add information where missing.

The service may compare all submitted quotes for a specific CSR and identify significant outliers (High or Low) relative to (i) other submitted quotes for that CSR and (ii) historical CSRs identified as being very similar in nature. Based on identifying a potential mistake. In this manner, the service may notify the submitting Service Provider of the issues and prompt for correction.

CSR Response Presentation to Consumer

Upon completion of the Service Provider Response Process, the consumer is presented with the results 1108. The listing of qualified Service Providers 1107 eligible for referral for a specific CSR is be presented to the consumer. The consumer sees a summary of the eligible Service Providers, including, for example, name, Quality Seal, etc.

The consumer may then request more detailed information on specific service providers by for example viewing full Quality Seal, pre-qualification information, etc., and potentially linking to the service provider's web site.

In the event that the CSR was sufficiently detailed for service providers to provide an online quote, then the consumer is presented with the submitted quotes. According to one embodiment, the quotes are presented in a format that provides for easy comparison, for example, difference or similarities may be highlighted in some manner to bring them to the attention of the consumer.

The consumer may also be provided with the ability to sort the presentation order based on different variables, including composite rating, cost, Service Provider location, etc.

The consumer may also have the ability to indicate communication preferences with regards to a specific CSR, including who they would like to communicate with and how: who will initiate communication (consumer or service provider), the mechanism (e-mail; telephone; etc.), when they want to be communicated with, etc. More specifically, in the event that quotes have been submitted, the consumer may be prompted to indicate which service provider they intend to move forward with, potentially ranking their preference if there is any question as to actually consummating a service transaction (e.g. the consumer may wish to actually communicate with the chosen Service Provider before finalizing a decision).

Consumer Follow-Up Process

Upon completion of a service transaction 1110, the consumers are requested to confirm the service transaction 1111, and provide a rating and review feedback 1112.

Service Completion Confirmation. Since a company implementing the service described herein, may base its business model on commissions collected from service providers, in general, it is desirable to be able to confirm whether a submitted CSR has led to a service transaction between consumer and service provider 1111. The consumers are requested to confirm the service transaction 1111 at time they provide consumer feedback 1112.

Service Transaction Confirmation. The communication to the Consumer may include a summary description of the original CSR and a Y/N indicator to ensure that the CSR is the correct one.

Date of Service. The Consumer is prompted to enter the date the Service Transaction was completed.

Service Provider. From a list of Service Providers who submitted Quotes or were Referred to the Consumer via the CSR Matching Process, the Consumer may be asked to identify the ultimate Service Provider who completed the Service Transaction.

Service Cost. The Consumer will be prompted to enter the total cost (price paid to the Service Provider) of the Service Transaction (and potentially other related information such as method of payment, parts vs. labor, financed, etc.).

Rating & Review Process & Consumer Feedback Upon completion of a service transaction facilitated by the service, consumers may be asked to complete the R&R Process 11123 for the specific service provider(s) involved.

Rating. Several questions regarding service provider performance may be posed to the consumer requiring a "quantitative" answer (e.g. on a scale of 1 to 5, ...). These quantitative ratings can subsequently be presented to consumers as part of the subjective

information available to support an educated service provider decision. As described above, the rating information may also serve as a component for the Matching Process 1106 by combining the individual scores, potentially with a weighting scheme, to create a composite score.

5 *Review.* Consumers may also be provided with space to input a written qualitative review of the service provider's performance. As above, this qualitative review can be presented to consumers as subjective information.

Service Provider Follow-Up Process

10 If the consumer has confirmed completion of a service transaction based on a CSR, then follow-up may be initiated with the appropriate service provider 1113, as indicated by the consumer. In the event that the consumer has not confirmed consummation of service transaction, then based on time rules, the Follow-Up Process may be initiated with all of the quoting or referred service providers for a specific CSR 1113.

15 Communication. Based on preferences established by the service provider, the commerce facilitator platform may send a communication, either via e-mail or fax, to initiate the Follow-Up Process. The frequency of this communication may be controlled (e.g., multiple Follow-Ups may be grouped and sent on a periodic basis versus individually forwarded more frequently). Communication may also be bundled with
20 certain billing notification related to fees due from the service provider to the company.

Service Completion Confirmation

Project Confirmation. If the consumer has already confirmed consummation of the service transaction, then the service provider will be asked to also confirm. If the consumer has not confirmed, then the communication to the service provider will include
5 a summary description of the CSR and a request for information regarding any subsequent communication with the consumer, including confirmation of a service transaction.

Date of Service. The service provider will be prompted to confirm the date the service was completed, as indicated by the consumer. If the consumer has not specified
10 the Date of Service, then the service provider will be prompted to enter this information.

Service Cost. The service provider will be prompted to confirm the Service Cost indicated by the consumer. If the consumer has not specified the Service Cost, then the service provider will be prompted to enter this information.

Service Feedback. Service providers may be prompted to rate their experience
15 with the service for a specific service transaction. An input form is presented that proposes several quantitative questions and openly requests qualitative feedback.

Fraud Indicators. If the company's business model is ultimately based on collecting a commission from service providers on completed service transactions, then the company will want to ensure that it can accurately track consumer-service Provider
20 transactions.

Confirmation. The commerce facilitator platform will "flag" situations where a CSR has received sufficient interest and even online quotes, but where neither the

consumer nor the service provider has, upon Follow-Up, confirmed consummating a service transaction.

Service Cost. In the event where the consumer and/or the service provider have confirmed consummating a service transaction, the commerce facilitator platform may assess the probability of accuracy of the indicated Service Cost. For example, the commerce facilitator platform may compare the indicated Service Cost against (i) the range of quotes and/or (ii) a historical benchmark established by the service based on similar service provisions.

Alternative Communications Mechanisms

The service may also support various alternative communication mechanisms 1110, besides the Internet, for communicating with participating consumers and service Providers regarding the status of CSRs. Some of the alternative communication mechanisms are described as follows:

Online Communication.

E-mail may be utilized to confirm user actions, notify of status, and solicit feedback and confirmation related to specific CSRs. A web site status box may be accessed from within the web site, this summarizes CSR status and enables related communications and actions; recognized users may be notified that a “status” awaits them. ICQ/Live Chat may be utilized as user support communication mechanism.

Offline Communication.

Pager may be utilized to notify the service provider of a CSR via pager message; depending on pager functionality, the service provider may be able to initiate initial response (Y/N) via the pager.

Automated Telephone may be used to notify the service provider of a CSR via an automated telephone call which may deliver a computer generated or voice recorded summary message and enable initial (Y/N) response.

IVR Database may serve as a source for service providers to check the status of their CSRs by accessing an IVR database; may include detailed information on an available CSR or information on CSR that is "in process"; will support response (Y/N) through the IVR mechanism.

Fax may also be used as an alternative to e-mail for delivering detailed information on an Available CSR; automated distribution; additionally, the commerce facilitator supports detailed response submission via fax with entry into the process either by manual operator or scan technology.

Finally, telephone/live operators may be utilized as user support communication mechanism.

Appendices

Step-by-step screen shots illustrating exemplary end-to-end communications between consumers and service providers according to one embodiment of the present invention are attached hereto as **Appendix A**.


In the foregoing specification, the invention has been described with reference to specific embodiments thereof. It will, however, be evident that various modifications and changes may be made thereto without departing from the broader spirit and scope of the invention. The specification and drawings are, accordingly, to be regarded in an illustrative rather than a restrictive sense.

Appendix A

[illegible]

2. A previously registered consumer logs in using their email and password.

006750 60642560

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Log In

[If you are a Service Professional. Click Here](#)

Enter your primary e-mail address below:

What is your password?

☐ I don't have one. I'm a new user.

☒ Returning member? Enter password below

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3. The Consumer is presented with their home page and clicks on "START a new home project!"

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HOME SERVICES *More Services Coming Soon!*

Welcome Back TEST Demo!

...your free connection to reliable neighbor recommended service professionals!

START
a new home project!

Choose From Over 485 Services!

Painting
Plumbing
electrical
MAID SERVICE
Handyman...
and more!

Active Projects

Print your Active Project List

SM #	Description	Submitted	Status	Action
4363	Refinish an Appliance	03/27/00	Certified Match - Referral	View Results
4413	Repair Ceramic Tile for Floors, Wall and Countertops	03/28/00	Certified Match	View Results
4414	Find an Air Duct and Vent Cleaning Service	03/28/00	Certified Match	View Results

SEARCH


Total Site

GO!

Get Free Internet Service!

4. Consumer selects the category and zip code.

HOME SERVICES


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MAGIC**

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[Ratings & Reviews](#)
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[GO!](#)

HOME SERVICES
*More Services
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Home Services

ServiceMagic will match you to the right service professional who is reliable and ready to go to work for you!

Our member professionals are individually screened for:


- Required licensing
- Clear bankruptcy background
- Clean legal history

1. Home Services

Or Use the Key Word Search

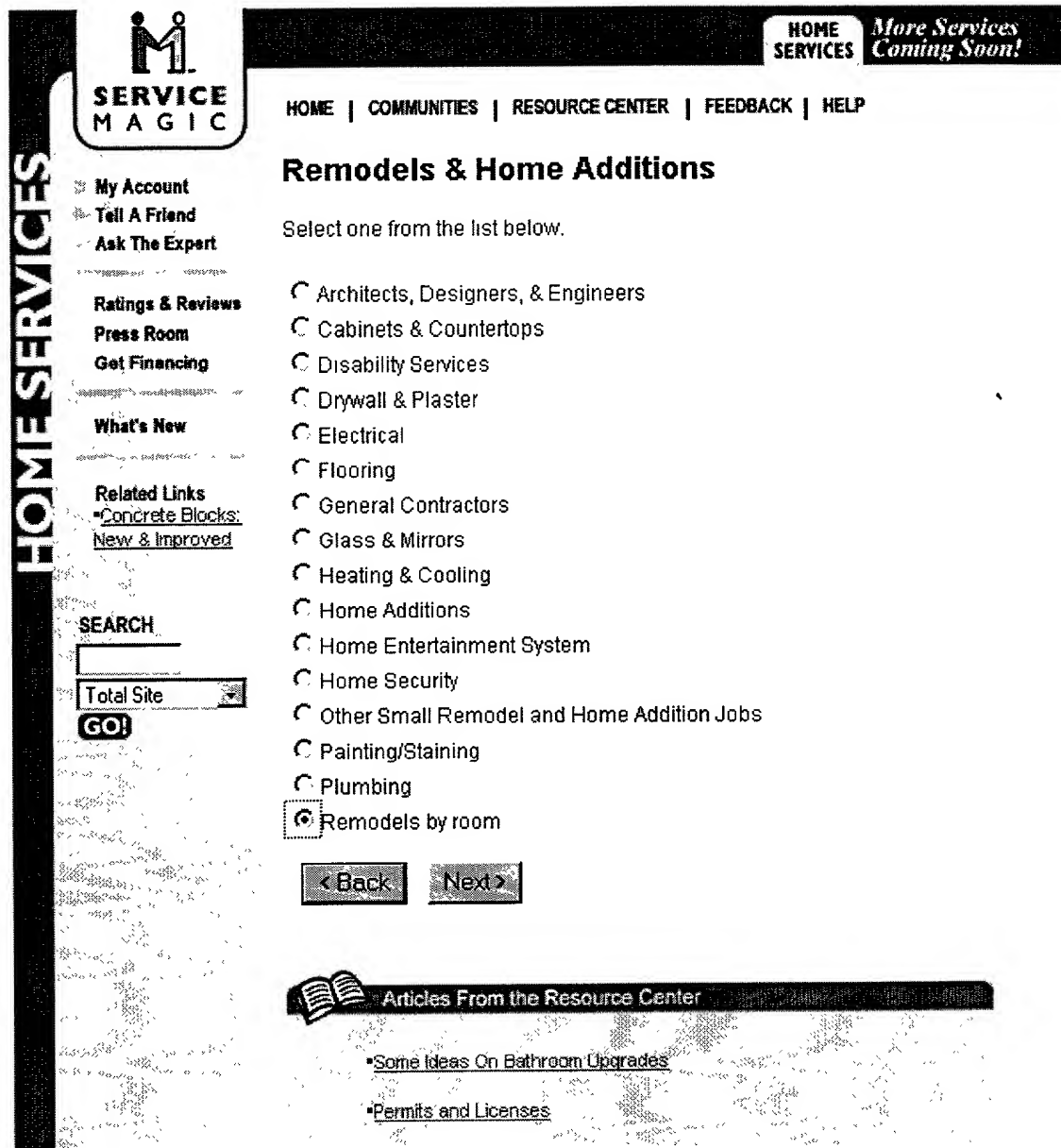
2. ZIP code

(This allows ServiceMagic to match you to service professionals in your neighborhood.)

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5. Consumer selects the next level of detail.



Service Magic

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HOME SERVICES *More Services Coming Soon!*

Remodels & Home Additions

Select one from the list below.

- ☐ Architects, Designers, & Engineers
- ☐ Cabinets & Countertops
- ☐ Disability Services
- ☐ Drywall & Plaster
- ☐ Electrical
- ☐ Flooring
- ☐ General Contractors
- ☐ Glass & Mirrors
- ☐ Heating & Cooling
- ☐ Home Additions
- ☐ Home Entertainment System
- ☐ Home Security
- ☐ Other Small Remodel and Home Addition Jobs
- ☐ Painting/Staining
- ☐ Plumbing
- ☒ Remodels by room

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HOME SERVICES

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- Ask The Expert
- Ratings & Reviews
- Press Room
- Get Financing
- What's New
- Related Links
- [Concrete Blocks: New & Improved](#)


SEARCH

Total Site

GO!

6. Consumer selects the next level of detail.

006750 60644560

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Coming Soon!*

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Remodels by room

Select a type of remodel.

☐ General remodel

☐ Kitchen


☒ Bathroom

☐ Basement

☐ Enclosures (patio, porch)

☐ Garage conversion

☐ Other

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SEARCH

Total Site
GO!

7. The Consumer answers the interview questions.

006750 606750

HOME SERVICES

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HOME SERVICES *More Services Coming Soon!*

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Remodel a Bathroom

Answer the brief questions below to find the right professional for your project. None of the responses are required, but the more information you provide, the better ServiceMagic can do its job of finding the right match.

Name your project

Remodel a Bathroom

Please select residence

25 Demo Lane Consumer Suite Golden, CO

New Residence

[Feature article: Bathroom Remodel](#)

[Need help answering these questions?](#)

1. What type of design preparation has been done for the remodel project? (Select all that apply)

☒ Cut outs or photos

☒ Sketches

☐ Architect's drawings

☐ Permits pulled

☐ Other (specify in additional details box below)

2. What function will the bathroom serve?

- ☒ Master bath
- ☐ Children's bath
- ☐ Family bath
- ☐ Guest bath
- ☐ Powder room
- ☐ Other (describe in additional details box below)
- ☐ Don't know

3. What is the square footage of the area to be remodeled?

40

4. What is needed for your remodel project?

- ☒ Flooring
- ☒ Cabinetry/Countertops
- ☒ Plumbing
- ☒ Electrical
- ☐ Heating/Cooling
- ☐ Appliances
- ☐ Windows/Doors
- ☒ Painting/Staining
- ☐ Wall removal/building
- ☐ Other (specify in additional details box below)

5. What quality level do you want for your remodel project?

- ☐ Economy
- ☐ Mid-range
- ☒ Luxury
- ☐ Don't know

6. Describe any additional details.

I would like my antique tub to be the focal point of the bathroom

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8. The Consumer answers more information about the Service Request.

006750 60644560


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[Quality Paint Jobs](#)

SEARCH

Total Site

GO!

Project Description

Please complete the following information so we can be sure to match you to the right professional.

Estimated Job Size

How much do you anticipate spending on this project?*

\$5,001 - \$10,000

Desired Start Date

When do you prefer to begin this project?*

5 - 6 weeks

Is this timing flexible?*

☒ Yes

☐ No

Estimated Job Size

If you learn that this project will cost more than your Estimated Job Size above, are you still interested in completing the project?*

☒ Yes

☐ No

**Project
Attributes**

Does project require
work on a historical
structure?

No ☐

Is project covered by
insurance claim?

No ☐

Is this service
required for the
closing of a home
sale?*

No ☐

**Residence
Selection**

Please Select
Residence for this
project

25 Demo Lane Consumer Suite Golden, CO ☐


New Residence

Continue

[Home Services](#) | [Home](#) | [Communities](#) | [Resource Center](#) | [Help](#) | [Sitemap](#) | [Privacy Statement](#)
[My Account](#) | [What's New](#) | [Tell A Friend](#) | [About Us](#) | [Affiliate Partner Program](#) | [Contact Us](#)

9. The Consumer is given the option if they would like a Confirmed Match or a Suggested Match. In this example, the consumer selected Confirmed Match.

HOME SERVICES


**SERVICE
MAGIC**

[HOME](#) | [COMMUNITIES](#) | [RESOURCE CENTER](#) | [FEEDBACK](#) | [HELP](#)

[My Account](#)
[Tell A Friend](#)
[Ask The Expert](#)
[Ratings & Reviews](#)
[Press Room](#)
[Get Financing](#)
[What's New](#)
[Related Links](#)
[Air Cleaners](#)
[Clearing the Air](#)
[Critique Floor Plans](#)

SEARCH

Total Site


HOME SERVICES *More Services Coming Soon!*

Contact Options
* Please select the type of match you would like to receive.

Confirmed Match
☒ Within one business day, we will get back to you with member professionals who have **reviewed your project and are ready to act.**


Suggested Match
☐ We will immediately match you to member professionals and **you contact them within 48 hours.**

Contact Preference
* Please select the phone number and time of day that service professionals should use to contact you.
 ext
Provide the best time and day for service professionals to reach you.
 between through
Some service professionals may use e-mail to contact you, if that's OK please provide your e-mail address.

 [Return to home](#)

10. The Consumer is give a summary of the Service Request information and asked if they are serious about submitting the Service Request.

HOME SERVICES



HOME SERVICES

More Services Coming Soon!

HOME | COMMUNITIES | RESOURCE CENTER | FEEDBACK | HELP

My Account

Tell A Friend

Ask The Expert

Ratings & Reviews

Press Room

Get Financing

What's New

Related Links

Air Cleaners--

Clearing the Air

House Painting

Service Request Identification

ServiceMagic Description	Remodel a Bathroom
Your Description	Remodel a Bathroom

Service Request Description

Completed preparations	Cut outs or photos Sketches
Bathroom function	Master bath
Square footage	40
What is needed for basement project	Flooring Cabinetry/Countertops
Quality level	Plumbing Electrical Painting/Staining
Special requirements	Luxury
	I would like my antique tub to be the focal point of the bathroom

Property Profile and Matching Information

Residence	Golden, CO 09990
Home Age	6 - 10 Years
Home Size	2,000 - 2,999 sq.ft.
Home Owner	Y
Property Type	Primary Home
Estimated Job Size	\$5,001 - \$10,000
Preferred Start Date	5 - 6 weeks
Historical Work	No
Covered by Insurance	No
Required for a Home Closing	No

By submitting this service request, I agree that:

- I will return calls to ServiceMagic professionals within 48 hours..
- I will meet with ServiceMagic professionals to begin my project.
- I will inform ServiceMagic if I cancel or postpone my project.
- I will complete a brief ratings survey for the service professional that finished my project.

SEARCH

Total Site

By saving this service request:

- I can return to the site, submit this request and ServiceMagic will look for a Service Professional match on my behalf

Save for Later

Submit Now



Return to Home



Articles From the Resource Center

• [Architects and Designers](#)

• [Vacation Home Security Tips](#)

[Home Services](#) | [Home](#) | [Communities](#) | [Resource Center](#) | [Help](#) | [Sitemap](#) | [Privacy Statement](#)
[My Account](#) | [What's New](#) | [Tell A Friend](#) | [About Us](#) | [Affiliate Partner Program](#) | [Contact Us](#)

11. The Consumer is given a confirmation page that the job has been submitted giving them a ServiceMagic Number (7904).

ServiceMagic

HOME SERVICES *More Services Coming Soon!*

HOME | COMMUNITIES | RESOURCE CENTER | FEEDBACK | HELP

Request Submitted

Thank you! Service Request Submitted!

Here's what happens next:

- 1. The ServiceMagic Matching Engine does the work for you**
We use your service request to match ServiceMagic Professionals in your area to your job. Our goal is to find three companies that can start your project when you want.
- 2. ServiceMagic notifies you within 24 hours**
We will e-mail you when we have found up to three ServiceMagic Professionals who want to bid on your project. If three are not available, for whatever reason, we will find more search options for you.
- 3. Select your ServiceMagic Professional**
Log back on to our web site and read consumer ratings for the three ServiceMagic Professionals presented to you. You can even find quotes about their work, and link to their web sites. Then pick the best match for your project.

HOME SERVICES

- My Account
- Tell A Friend
- Ask The Expert
- Ratings & Reviews
- Press Room
- Get Financing
- What's New
- Related Links
 - Air Cleaners--
 - Clearing the Air
 - Laundry Room Solutions

SEARCH

Total Site
GO!

Service Request Identification

ServiceMagic # 7904
ServiceMagic Description Remodel a Bathroom
Your Description Remodel a Bathroom

Service Request Description

Completed preparations Cut outs or photos Sketches
Bathroom function Master bath
Square footage 40
What is needed for basement project Flooring Cabinetry/Countertops
 Plumbing Electrical Painting/Staining

Quality level Luxury
Special requirements I would like my antique tub to be the focal point of the bathroom

Property Profile and Matching Information

Residence Golden, CO 09990
Home Age 6 - 10 Years
Home Size 2,000 - 2,999 sq.ft.
Home Owner Y
Property Type Primary Home
Customer's Estimated Job Size \$5,001 - \$10,000
Budget Flexible
Customer's Preferred Start Date 5 - 6 weeks
Timing Flexible
Covered by Insurance No
Required for a Home Closing No
Historical Work No
Comments

Contact Information

Contact
Phone (303) 999-9999
Business
FAX
E-mail democonsumer@servicemagic.com



Return to Home

12. The Consumer is given a Thank You for Submitting Service Request email immediately after submitting Service Request.

Hi TEST Demo,

Thank you very much for submitting your Service Request. We hope that you were able to learn some valuable information about your project as you completed the ServiceMagic interview.

Job Number: **7904**

Description: **Remodel a Bathroom**

Within the next 24 hours (excluding weekends), you can expect to hear from us with the results of your match. We'll invite you back to the website to research the service professionals and choose the right company for your project.

We appreciate that you chose to be part of ServiceMagic's Consumer Community, and we hope you'll visit us regularly. We'll be adding new categories of service as our network of member service professionals grows across the country. So check us out! We look forward to connecting you with more and more local services.

Thanks for being a member of the ServiceMagic Community!

Regards,

Blake Quinn

Director of Customer Service

(Toll-Free) (877) 699-4736

customerservice@ServiceMagic.com

13. What is happening behind the scenes after the consumer presses submit now is as follows:
- The ServiceMagic matching engine runs and matches Service Professionals to the task.
 - Service Professionals are notified that they can bid on the job.
 - Service Professionals Accept or Reject the job.
 - The consumer is presented with the Service Professionals who accepted the job.
- This example will show b-d. The Matching Engine process is an internal process that can not be demonstrated via screen shots.

14. The Service Professionals are notified of the job via Fax, Email, Phone or Pager. The following is an example of an email sent to one of the Service Professionals.

Hi Fred Lyman,

ServiceMagic.com (formerly Wisen.com) has received a Service Request that matches the work preferences you provided us. **YOU MUST RESPOND TO SERVICEMAGIC BY THURSDAY, MAY 18th, 02:38 PM TO ACCEPT OR REJECT THIS REFERRAL.** We have sent this initial notice to five companies that matched. Only the first three companies to accept the referral will be presented to the customer - please respond as soon as possible. Here is the general referral information:

Job Number : 7904

Description : Remodel a Bathroom

Location : Golden, CO 09990

Customer's preferred

Start Date : 5 - 6 weeks

Timing : Flexible

Customer's estimated

Job Size : \$5,001 - \$10,000

Budget : Flexible

Age of Home : 6 - 10 Years

Size of Home : 2,000 - 2,999 sq.ft.

Property Type : Primary Home

Additional information:

Special requirements : I would like my antique tub to be the focal point of the bathroom

What is needed for basement project : Flooring

What is needed for basement project : Cabinetry/Countertops

What is needed for basement project : Electrical

What is needed for basement project : Painting/Staining

What is needed for basement project : Plumbing

Quality level : Luxury

Bathroom function : Master bath

Completed preparations : Cut outs or photos

Completed preparations : Sketches

To accept or reject, log onto <http://www.ServiceMagic.com> and select this job from the Active Projects in the "My Account" section. Otherwise, you can call our Automated Answering Service toll-free at (877) 947-3676 and enter your Account #. From the main menu, press "1" to listen to your New Leads, and then press "2" to respond to this specific job.

Based on the Estimated Job Size, you will be charged a Job Win Fee of **0.07%** if you win the job. This is only an estimate. The actual Job Win Fee will be based on the total cost of the job after the work is complete. Please refer to your ServiceMagic Fee Schedule for more information.

As a follow up, ServiceMagic will only send the customer contact information to the first three companies that accept the referral within 24 hours. If you are not one of the first three, you will be informed of your ineligibility for this referral when you respond.

Thanks, as always, for being a part of the ServiceMagic Community. Please contact us if you have any questions or comments.

Regards,

Blake Quinn
Director of Customer Service
(Toll-Free) (877) 947-3639
customerservice@ServiceMagic.com

15. A Service Professional who was notified of the job logs in after going to www.servicemagic.com and clicking on My Account.

The screenshot shows the ServiceMagic.com website. On the left is a vertical sidebar with the word "WELCOME!" and a list of links: My Account, Register Now, Tell A Friend, Ask The Expert, Ratings & Reviews, Press Room, Get Financing, What's New, Related Links (Air Cleaners, Clearing the Air, Exterior Painting), and a SEARCH section with a "GO!" button. The main header includes the ServiceMagic logo and navigation links: HOME SERVICES, HOME, COMMUNITIES, RESOURCE CENTER, FEEDBACK, HELP, and a banner for "More Services Coming Soon!". The central "Log In" section contains fields for "Enter Username here:" (with "cschmidt" entered) and "Enter password here:" (with "johndoe" entered), a "Forgot your password?" link, a "Submit" button, and a checkbox for "Would you like ServiceMagic to customize your experience so you won't have to sign in each time you return to our site?". The footer contains a list of links: Home Services, Home, Communities, Resource Center, Help, Sitemap, Privacy Statement, My Account, What's New, Tell A Friend, About Us, Affiliate Partner Program, and Contact Us.

WELCOME!

SERVICE MAGIC

HOME SERVICES | HOME | COMMUNITIES | RESOURCE CENTER | FEEDBACK | HELP

Log In

Enter Username here:

Enter password here:

[Forgot your password?](#)

Would you like ServiceMagic to customize your experience so you won't have to sign in each time you return to our site?

☐ YES ☐ NO


Submit

SEARCH

Total Site

[Home Services](#) | [Home](#) | [Communities](#) | [Resource Center](#) | [Help](#) | [Sitemap](#) | [Privacy Statement](#)
[My Account](#) | [What's New](#) | [Tell A Friend](#) | [About Us](#) | [Affiliate Partner Program](#) | [Contact Us](#)

16. The Service Provider Clicks on Accept.



HOME | **RESOURCE CENTER** | **FEEDBACK** | **HELP**

- ▶ Job Information
- ▶ Work Preferences
- ▶ Member Benefits
- ▶ View Your Website
- ▶ Job Boards
- ▶ Ratings & Reviews
- ▶ Service Request
- ▶ Performance Pledge

Search

Total Site

GO!

Turn Off
Job Notification

From:

mm dd yy

Through:

mm dd yy

Submit

JOB INFORMATION

New Jobs
Jobs In Progress
Closed Jobs


Accept, reject or view more information by clicking on the buttons to the right of each referral

Assisted

Job #	Description	Location	Job Size	Lead Time	Respond By	
7773	Remodel a Bathroom	Golden 09990	\$2,501 - \$5,000	3 - 4 weeks	05/17/00 8:44 PM	<input checked="" type="radio"/> Accept <input type="radio"/> Reject <input type="radio"/> View Details
7904	Remodel a Bathroom	Golden 09990	\$5,001 - \$10,000	5 - 6 weeks	05/18/00 2:38 PM	<input checked="" type="radio"/> Accept <input type="radio"/> Reject <input type="radio"/> View Details


Direct

Job #	Description	Location	Job Size	Lead Time	Notified	
5941	Remodel a Bathroom	Golden 09990	\$5,001 - \$10,000	7 - 8 weeks	04/25/00	<input type="radio"/> View Details
6669	Remodel a Bathroom	Golden 09990	\$5,001 - \$10,000	5 - 6 weeks	05/04/00	<input type="radio"/> View Details



Resource Center

- [Homeowner's Spring Checklist](#)
- [Heirloom Gardening Tools](#)
- [Garden Spring Planning Tips](#)



KBIS
KITCHEN/BATH INDUSTRY SHOW

Information from the
largest Kitchen/Bath
Industry Show

[Home](#) | [Job Information](#) | [Service Request](#) | [Job Boards](#) | [Resource Center](#) | [Help](#) | [Sitemap](#) | [Privacy Statement](#)
[Work Preferences](#) | [Member Services](#) | [Tell A Friend](#) | [About Us](#) | [Affiliate Partner Program](#) | [Contact Us](#)

17. The Service Provider submits an on-line bid.

006750-60644560

**M SERVICE
MAGIC**

[HOME](#) | [RESOURCE CENTER](#) | [FEEDBACK](#) | [HELP](#)

➤ Job Information

➤ Work Preferences

➤ Member Benefits

➤ View Your Website

➤ Job Boards

➤ Ratings & Reviews

➤ Service Request

➤ Performance Pledge

Search

Total Site

GO!

Turn Off

Job Notification

From:

mm dd yy

Through:

mm dd yy

Submit

New Jobs

Jobs in Progress

Closed Jobs

Next Steps

S (Submit with Bid)

C (Submit without Bid)

- Complete these optional bid questions to better your chance of winning this job
- Submit with or without online bid
- Customer Contact sent to the first three service professionals that accept the job

Online Bid

This information will be seen by the customer.

Please enter the earliest project start date.

May 17 2000

Please enter the total estimate for materials.

3000

Please enter the total estimate for labor.

1500

Please enter the estimate for the project.

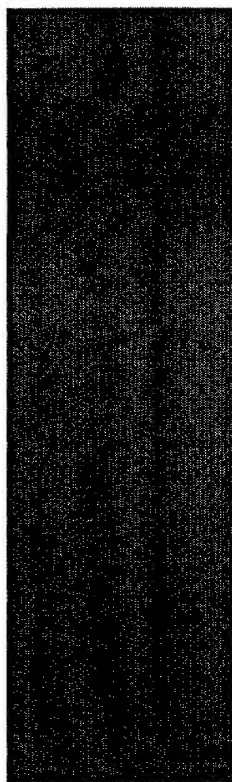
4500

Please enter any additional comments.

Need more information for a more thorough estimate. The above estimates are based upon other customers with similar requests.

Submit with Bid

Submit without Bid



Service Request Details

Job #	7904
Description	Remodel a Bathroom
Completed preparations	Cut outs or photos Sketches
Bathroom function	Master bath
Square footage	40
What is needed for basement project	Flooring Cabinetry/Countertops Plumbing Electrical Painting/Staining
Quality level	Luxury
Special requirements	I would like my antique tub to be the focal point of the bathroom




Resource Center

- [Refinishing Your Tired Deck](#)
- [How to Select a Service Professional](#)
- [Heirloom Gardening Tools](#)

☐ [Get Free
Internet Service!](#)

[Home](#) | [Job Information](#) | [Service Request](#) | [Job Boards](#) | [Resource Center](#) | [Help](#) | [Site Map](#) | [Privacy Statement](#)
[Work Preferences](#) | [Member Services](#) | [Tell A Friend](#) | [About Us](#) | [Affiliate Partner Program](#) | [Contact Us](#)

18. The Service Professional is presented with a summary page of their bid. The job goes to the Job Information Jobs in Progress Tab.



[HOME](#) | [RESOURCE CENTER](#) | [FEEDBACK](#) | [HELP](#)

- ▶ Job Information
- ▶ Work Preferences
- ▶ Member Benefits
- ▶ View Your Website
- ▶ Job Boards
- ▶ Ratings & Reviews
- ▶ Service Request
- ▶ Performance Pledge

Search

Total Site

GO!

Turn Off

Job Notification

From

mm dd yy

Through

mm dd yy

New Jobs

Jobs in Progress

Closed Jobs

Job Referral Accepted

(Returns to New Jobs)

Thanks for your online bid! This information will be provided to the customer. Next time you come back, this referral will be displayed in "Jobs in Progress"

Job #

7904

Description

Remodel a Bathroom

Job Estimate

Earliest start date

May 17, 2000

Materials estimate - TOTAL

3000

Labor estimate - TOTAL

1500

Project estimate - TOTAL

4500

Project comments

Need more information for a more thorough estimate. The above estimates are based upon other customers with similar requests.

[Return to New Jobs](#)

19. A Second Service Professional who was notified of the job goes to www.servicemagic.com, logs in and accepts the job (7904).

JOB INFORMATION

[HOME](#) | [RESOURCE CENTER](#) | [FEEDBACK](#) | [HELP](#)

- Job Information
- Work Preferences
- Member Benefits
- View Your Website
- Job Boards
- Ratings & Reviews
- Service Request
- Performance Pledge

Search

Total Site

GO!

Turn Off

Job Notification

From: mm dd yy

New Jobs | Jobs in Progress | Closed Jobs

Accept, reject or view more information by clicking on the buttons to the right of each referral.

Assisted

Job #	Description	Location	Job Size	Lead Time	Respond By	
7773	Remodel a Bathroom	Golden 09990	\$2,501 - \$5,000	3 - 4 weeks	05/17/00 8:44 PM	Accept Reject View Details
7790	Remodel a Bathroom	Golden 09990	\$5,001 - \$10,000	5 - 6 weeks	05/17/00 10:41 PM	Accept Reject View Details
7904	Remodel a Bathroom	Golden 09990	\$5,001 - \$10,000	5 - 6 weeks	05/18/00 2:38 PM	Accept Reject View Details

Direct

Job #	Description	Location	Job Size	Lead Time	Notified	
5941	Remodel a Bathroom	Golden 09990	\$5,001 - \$10,000	7 - 8 weeks	04/25/00	View Details
5984	Remodel a Bathroom	Golden 09990	\$101 - \$250	Less than 1 week	04/25/00	View Details
6669	Remodel a Bathroom	Golden 09990	\$5,001 - \$10,000	5 - 6 weeks	05/04/00	View Details

20. The second Service Provider accepts without an on-line bid.

ServiceMAGIC

JOB INFORMATION

[HOME](#) | [RESOURCE CENTER](#) | [FEEDBACK](#) | [HELP](#)

[New Jobs](#) | [Jobs in Progress](#) | [Closed Jobs](#)

Next Steps

- Complete these optional bid questions to better your chance of winning this job
- Submit with or without online bid
- Customer Contact sent to the first three service professionals that accept the job

Online Bid

This information will be seen by the customer

Please enter the earliest project start date.
May 25 2000

Please enter the total estimate for materials
[input field]

Please enter the total estimate for labor.
[input field]

Please enter the estimate for the project
[input field]

Please enter any additional comments.
[input field]

[Submit with Bid](#) [Submit without Bid](#)

Search
[input field]
Total Site
GO!

Turn Off Job Notification
From: mm dd yy
Through: mm dd yy
Submit

21. The job goes to the Job Information Jobs in Progress Folder

[HOME](#) | [RESOURCE CENTER](#) | [FEEDBACK](#) | [HELP](#)

[Job Information](#)
[Work Preferences](#)
[Member Benefits](#)
[View Your Website](#)
[Job Boards](#)
[Ratings & Reviews](#)
[Service Request](#)
[Performance Pledge](#)

Search

Total Site

GO!

Turn Off

Job Notification

From:

mm dd yy

Through:

mm dd yy

JOB INFORMATION


[New Jobs](#) | [Jobs in Progress](#) | [Closed Jobs](#)

Update the status of your jobs in progress by clicking on the arrow.

Job #	Description	Location	Status	
5953	Remodel a Bathroom	Golden 09990	Waiting for Response	(Update)
6644	Remodel a Bathroom	Golden 09990	Waiting for Response	(Update)
6719	Remodel a Bathroom	Golden 09990	Waiting for Response	(Update)
6858	Remodel a Bathroom	Golden 09990	Waiting for Response	(Update)
7776	Remodel a Bathroom	Golden 09990	Waiting for Response	(Update)
7849	Remodel a Bathroom	Golden 09990	Waiting for Response	(Update)
7904	Remodel a Bathroom	Golden 09990	Waiting for Response	(Update)

Get Free Internet Service!

22. A Service Professional who was notified of the job goes to www.servicemagic.com, logs in and rejects the job (7904).



JOB INFORMATION

[HOME](#) |
 [RESOURCE CENTER](#) |
 [FEEDBACK](#) |
 [HELP](#)

[New Jobs](#) |
 [Jobs in Progress](#) |
 [Closed Jobs](#)

Accept, reject or view more information by clicking on the buttons to the right of each referral

Assisted

Job #	Description	Location	Job Size	Lead Time	Respond By	
7773	Remodel a Bathroom	Golden 09990	\$2,501 - \$5,000	3 - 4 weeks	05/17/00 8:44 PM	Accept Reject View Details
7776	Remodel a Bathroom	Golden 09990	\$10,001 - \$25,000	9 - 12 weeks	05/17/00 8:59 PM	Accept Reject View Details
7790	Remodel a Bathroom	Golden 09990	\$5,001 - \$10,000	5 - 6 weeks	05/17/00 10:41 PM	Accept Reject View Details
7849	Remodel a Bathroom	Golden 09990	\$10,001 - \$25,000	Over 12 weeks	05/18/00 11:25 AM	Accept Reject View Details
7904	Remodel a Bathroom	Golden 09990	\$5,001 - \$10,000	5 - 6 weeks	05/18/00 2:38 PM	Accept Reject View Details

Direct

Job #	Description	Location	Job Size	Lead Time	Notified
-------	-------------	----------	----------	-----------	----------

Search

Total Site

GO!


Turn Off

Job Notification

From:

mm dd yy

23. The Service Professional is asked why they are rejecting the job. This information is for ServiceMagic use only and is not presented to the consumer. This job is stored in the Service Professionals Job Information Closed Jobs Folder.



[HOME](#) | [RESOURCE CENTER](#) | [FEEDBACK](#) | [HELP](#)

- ▶ Job Information
- ▶ Work Preferences
- ▶ Member Benefits
- ▶ View Your Website
- ▶ Job Boards
- ▶ Ratings & Reviews
- ▶ Service Request
- ▶ Performance Pledge

Search

Total Site

GO!

Turn Off

Job Notification

From:

mm dd yy

Through:

mm dd yy

New Jobs

Jobs in Progress

Closed Jobs

Job Referral Rejected

Are you sure you want to reject this job referral? By doing so this referral will move to "Closed Jobs" and you WILL NOT be able to bid on it

⊗ (Reject)

⊗ (Reject)

Service Request Identification

Job #	7904
Description	Remodel a Bathroom

☐ Start Time

☐ Job Size

☒ Job Type

☐ Job Location

Please add any comments to explain your rejection


I only work with modern fiberglass tubs.

[Close Job](#)

[Return to New Jobs](#)

[illegible]70

25. The Service Provider is presented with a summary of their bid.

**SERVICE
MAGIC**

[HOME](#) | [RESOURCE CENTER](#) | [FEEDBACK](#) | [HELP](#)

▶ Job Information

▶ Work Preferences

▶ Member Benefits

▶ View Your Website

▶ Job Boards

▶ Ratings & Reviews

▶ Service Request

▶ Performance Pledge

Search

Total Site

GO!

Turn Off

Job Notification

From:

mm

dd

yy

Through:

mm

dd


yy

New Jobs

Jobs in Progress

Closed Jobs

Job Referral Accepted



Thanks for your online bid! This information will be provided to the customer. Next time you come back, this referral will be displayed in "Jobs in Progress"

Job #7904

DescriptionRemodel a Bathroom

Job Estimate

Earliest start date

May 17, 2000

Materials estimate - TOTAL

7000

Labor estimate - TOTAL

3000

Project estimate - TOTAL

10000


Project comments

Luxury Bathrooms average around 4000 dollars more than normal bathrooms.

Return to New Jobs

71

26. The job goes to the Job Information Jobs in Progress Folder.



JOB INFORMATION

[HOME](#) | [RESOURCE CENTER](#) | [FEEDBACK](#) | [HELP](#)

- ▶ Job Information
- ▶ Work Preferences
- ▶ Member Benefits
- ▶ View Your Website
- ▶ Job Boards
- ▶ Ratings & Reviews
- ▶ Service Request
- ▶ Performance Pladge

Search

GO!

☐ **Turn Off**
Job Notification

[New Jobs](#) | [Jobs in Progress](#) | [Closed Jobs](#)

Update the status of your jobs in progress by clicking on the arrow

Job #	Description	Location	Status	
5953	Remodel a Bathroom	Golden 09990	Waiting for Response	(Update)
6644	Remodel a Bathroom	Golden 09990	Waiting for Response	(Update)
6719	Remodel a Bathroom	Golden 09990	Waiting for Response	(Update)
6858	Remodel a Bathroom	Golden 09990	Waiting for Response	(Update)
7776	Remodel a Bathroom	Golden 09990	Bid & Waiting	(Update)
7849	Remodel a Bathroom	Golden 09990	Waiting for Response	(Update)
7904	Remodel a Bathroom	Golden 09990	Bid & Waiting	(Update)

27. The three Service Professionals that accepted are given the consumer information. The following is an example of an email sent to one of the three Service Professionals who accepted.

Hi Fred Lyman,

Thanks, as always, for being a part of the ServiceMagic Community. Please let us know if we can help you in any way.

We are confirming that you were one of the first three companies to accept this referral.

Job Number: 7904

Description: **Remodel a Bathroom**

Location: **Golden, CO 09990**

Customer's preferred

Start Date : **5 - 6 weeks**

Timing : **Flexible**

Customer's estimated

Job Size : **\$5,001 - \$10,000**

Budget : **Flexible**

Please contact the customer at your earliest convenience, within the next **27** hours. The customer contact information is:

Customer Name : **TEST Demo**

Address : **25 Demo Lane, Consumer Suite**

Golden, CO 09990

Telephone : **(303)999-9999**

Email :

Regards,

Blake Quinn

Director of Customer Service

(Toll-Free) (877) 947-3639

customerservice@ServiceMagic.com

28. The Consumer Gets email stating we have found three SPs

Hi TEST Demo,

Congratulations! We've found 3 ServiceMagic Member Service Professionals who are available and interested in your service project. You should expect to hear from them within the next 24 hours (excluding weekends), or feel free to contact them at your convenience.

Job Number: **7904**

Description: **Remodel a Bathroom**

Please log in to <http://www.ServiceMagic.com> and click on the project listed above. You'll find information on the ServiceMagic Member Service Professionals interested in your specific service need, including contact information and other instructions on how to proceed.

And once your project is finished, please come back to the site and submit your rating and review. Your honest review of the service professional's performance will help your neighbors choose the right company for their next project. You can help make our community better.

We appreciate that you have chosen to be part of ServiceMagic's Consumer Community, and we hope you'll visit regularly. We'll be adding new categories of service professionals as we grow, and we'll be able to connect you with more and more local services.

Thanks for being a member of the ServiceMagic Community!

Regards,

Blake Quinn

Director of Customer Service

(Toll-Free) (877) 699-4736

customerservice@ServiceMagic.com

29. Consumer clicks on the URL in the email <http://www.servicemagic.com>, clicks on My Account, logs in and is told that job number 7904 has a certified match.

7904	Remodel a Bathroom	05/17/00	Certified Match	View Results
------	--------------------	----------	-----------------	------------------------------

Completed Projects

SM #	Description	Submitted	Status	Action
4332	Install Cabinets	03/26/00	CLOSED	View Detail
4333	Install or Replace an Appliance	03/26/00	CLOSED	View Detail
4334	Install or Replace an Appliance	03/26/00	CLOSED	View Detail
4386	Install Hardwood Floors	03/27/00	CLOSED	View Detail
4387	Refinish Hardwood Floors	03/27/00	CLOSED	View Detail
4408	Install Finish or Trim Work	03/28/00	CLOSED	View Detail
4409	Purchase an Appliance	03/28/00	CLOSED	View Detail
4410	Refinish an Appliance	03/28/00	CLOSED	View Detail
4412	Clean Gutters	03/28/00	CLOSED	View Detail
4416	Find a Chimney or Fireplace Cleaning Service	03/28/00	CLOSED	View Detail
5704	Remodel a Bathroom	04/20/00	CLOSED	View Detail
5949	Install Hardwood Floors	04/25/00	CLOSED	View Detail
5984	Remodel a Bathroom	04/25/00	CLOSED	View Detail

Consumer Profile

TEST Demo
 25 Demo Lane Consumer Suite
 Golden, CO 09990
 (303) 233-3030
democonsumer@servicemagic.com

CHANGE THIS

[illegible]

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**ServiceMagic
Rating**

New Member

★★★★★

New Member

Earliest start
date.

May 17, 2000

May 17, 2000

Materials
estimate -
TOTAL.

7000

3000

Labor
estimate -
TOTAL

3000

1500

Project
estimate -
TOTAL


10000

4500

Project
comments.Luxury
Bathrooms
average
around 4000
dollars more
than normal
bathrooms.Need more information for a
more thorough estimate. The
above estimates are based
upon other customers with
similar requests.[Company
Profile](#)
[Send Message](#)[Ratings &
Reviews](#)[Company Profile](#)
[Send Message](#)
[Service Professional's
ServiceMagic Web Site](#)
[Service Professional's
Company Web Site](#)
[Ratings & Reviews](#)[Company Profile](#)
[Send Message](#)
[Ratings & Reviews](#)**Finished with your project?**[Rate your service professional](#) **View Service Request**[Return to home](#)

31. The consumer has the option to view the Company Profiles, Send a message to the Service Professional, view their Web Sites, and their Ratings and Reviews. The following pages are examples of this information for one Service Professional.

a. Company Profile




HOME SERVICES

HOME SERVICES *More Services Coming Soon!*

HOME | COMMUNITIES | RESOURCE CENTER | FEEDBACK | HELP

Company Profile

This information was provided by the service professional, and has been verified by ServiceMagic.



ServiceMagic Site
Company Web site

1234 Canyon St.
Longmont, CO 09990
(303) 111-1111
demosp1@servicemagic.com

Company Overview
overview

Company Mission
mission

In Business Since	1979
Workers Compensation Amount	
Liability Insurance Amount	10,000,000
Bonding Amount	7,500

There is no license information available for this service professional

[Return to Previous Page](#)

Related Links

- [Air Cleaners](#)
- [Clearing the Air](#)
- [Electrical Safety Tips](#)


SEARCH

Total Site

[Home Services](#) | [Home](#) | [Communities](#) | [Resource Center](#) | [Help](#) | [Sitemap](#) | [Privacy Statement](#)
[My Account](#) | [What's New](#) | [Tell A Friend](#) | [About Us](#) | [Affiliate Partner Program](#) | [Contact Us](#)

b. Send Message to a Service Professional

HOME SERVICES


**SERVICE
MAGIC**

My Account

Tell A Friend

Ask The Expert

Ratings & Reviews

Press Room

Get Financing

What's New

Related Links

[Air Cleaners--](#)
[Clearing the Air](#)

[Tune up the air](#)
[conditioner](#)

SEARCH

Total Site

GO!

HOME SERVICES *More Services Coming Soon!*

HOME | COMMUNITIES | RESOURCE CENTER | FEEDBACK | HELP

Send Message to Service Professional

To: Craig Schmidt (Beautiful Home & Bath)

From: TEST Demo

Message: *Choose one of the messages below*

☐ Please Contact Me ASAP

OR

Add your message below

Send Message

Return

Home Services | Home | Communities | Resource Center | Help | Sitemap | Privacy Statement

My Account | What's New | Tell A Friend | About Us | Affiliate Partner Program | Contact Us


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c. View the Service Professionals ServiceMagic Web Site.



d. If the Service Professional has their own Web Site, the consumer has a link to view that Web Site.

e. The Consumer can view the Ratings and Reviews given by other ServiceMagic consumers.

**SERVICE
MAGIC**

WELCOME!

[My Account](#)
[Tell A Friend](#)
[Ask The Expert](#)

[Ratings & Reviews](#)
[Press Room](#)
[Get Financing](#)

[What's New](#)

[Related Links](#)
[Air Cleaners -
Clearing the Air](#)
[Vinyl Flooring
Repair](#)

SEARCH

Total Site
GO!


[HOME SERVICES](#) *More Services
Coming Soon!*

[HOME](#) | [COMMUNITIES](#) | [RESOURCE CENTER](#) | [FEEDBACK](#) | [HELP](#)

Ratings and Reviews

The summary below represents work completed by this service professional in your neighborhood. We encourage all members to participate in the rating and review process to ensure that ServiceMagic connects you to the right professional every time.

Beautiful Home & Bath




ServiceMagic Rating

★★★★★


Timeliness	
Cleanliness	
Budget	
Quality of Work	
Value	
Overall Satisfaction	

[← BACK](#)

 [Return to Home](#)

[Home Services](#) | [Home](#) | [Communities](#) | [Resource Center](#) | [Help](#) | [Sitemap](#) | [Privacy Statement](#)
[My Account](#) | [What's New](#) | [Tell A Friend](#) | [About Us](#) | [Affiliate Partner Program](#) | [Contact Us](#)

32. The Consumer chooses a Service Professional. Work is scheduled and performed. Then the consumer comes back to ServiceMagic and selects that they are finished with their project (See Step 30 bottom of picture). They are given details about the job, presented with their matched Service Professionals and asked to rate them.



**SERVICE
MAGIC**

HOME SERVICES *More Services Coming Soon!*

HOME | COMMUNITIES | RESOURCE CENTER | FEEDBACK | HELP

Ratings and Reviews

We Care - how did the project go?
Give us your feedback! This is **your chance to rave**(or rant) about the service professional's history with ServiceMagic. Your responses will become part of this service professional's history with ServiceMagic. Your anonymous responses will help community members find the right service professional every time.

Service Request Identification

ServiceMagic #	7904
ServiceMagic Description	Remodel a Bathroom
Your Description	Remodel a Bathroom

Property Profile and Matching Information

Customer	TEST Demo
Residence	25 Demo Lane, Consumer Suite Golden, CO 09990 (H)(303) 233-3030 (W)
Contact Times	weekdays between 6:00pm and 8:00pm
Contact Preference	(303) 999-9999
Home Age	6 - 10 Years
Home Size	2,000 - 2,999 sq.ft.
Home Owner	Y
Property Type	Primary Home
Estimated Job Size	\$5,001 - \$10,000
Preferred Start Date	5 - 6 weeks
Historical Work	No
Covered by Insurance	No
Required for a Home Closing	No

Which of the following Service Professional's completed your job?

☐ Bath Remodels For Less 1449 Shore Dr. Seattle WA 09990

☐ Beautiful Home & Bath 1234 Canyon St. Longmont CO 09990

☐ Baths-R-Us 5678 Main St. South Boulder CO 09990

☐ Other Service Professional

☐ Work was not performed

Submit

Home Services | Home | Communities | Resource Center | Help | Sitemap | Privacy Statement
My Account | What's New | Tell A Friend | About Us | Affiliate Partner Program | Contact Us

WELCOME!

- My Account
- Tell A Friend
- Ask The Expert
- Ratings & Reviews
- Press Room
- Get Financing
- What's New
- Related Links
 - Air Cleaners--
 - Clearing the Air
 - When to Re-roof

SEARCH

Total Site

GO!

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This image shows a blank page from a document. A dark, textured vertical strip runs along the left edge, likely representing the binding or gutter of a book. The rest of the page is white and contains no text or other markings.

☐ Very Poor ☐ Poor ☐ Fair ☐ Good ☒ Very Good

Overall **Value** offered in terms of quality and price

☐ Very Poor ☐ Poor ☐ Fair ☒ Good ☐ Very Good

Overall Satisfaction

☐ Very Poor
 ☐ Poor
 ☐ Fair
 ☒ Good
 ☐ Very Good

Please provide any additional comments.

Thank You ServiceMagic - the room looks great.

[Clear Form](#)

[Home Services](#) | [Home](#) | [Communities](#) | [Resource Center](#) | [Help](#) | [Sitemap](#) | [Privacy Statement](#)
[My Account](#) | [What's New](#) | [Tell A Friend](#) | [About Us](#) | [Affiliate Partner Program](#) | [Contact Us](#)

34. When the Service Professional views the job it is in their Job Information Closed Jobs Folder.

Service Magic

JOB INFORMATION

HOME | RESOURCE CENTER | FEEDBACK | HELP

▶ Job Information
▶ Work Preferences
▶ Member Benefits
▶ View Your Website
▶ Job Boards
▶ Ratings & Reviews
▶ Service Request
▶ Performance Pledge

Search
Total Site

GO!

Turn Off
Job Notification
From: mm dd yy
Through: mm dd yy
Submit

Resource Center

- [Homeowner's Spring Checklist](#)
- [How to Select a Service Professional](#)
- [Heirloom Gardening Tools](#)

KBIS
KITCHEN/BATH INDUSTRY SHOW

Information from the
largest Kitchen/Bath
Industry Show

Job #	Description	Location	Date Closed	
5984	Remodel a Bathroom	Golden 09990	04/25/00	View Details
7904	Remodel a Bathroom	Golden 09990	05/17/00	View Details

Click on "View Details" to review job information

☐ Get Free Internet Service!

35. A separate billing process happens between the Service Professional and ServiceMagic. The Consumer is not impacted by this process.

CLAIMS

What is claimed is:

1. A method comprising:
establishing a database of pre-screened service providers;
extracting a description of a consumer's needs using interactive questions and
answer interviews appropriate for the desired task;
packaging and presenting the consumer's needs to multiple service providers that
meet a set of predetermined qualifications; and
presenting service providers' responses to the consumer after a predetermined
number of responses are received.
2. The method of claim 1, further comprising receiving confirmation of service
transactions by initiating automatic follow-up communication with the consumer
and the service providers.
3. The method of claim 1, wherein the establishing a database of pre-qualified service
providers further includes screening service providers by:
making inferences regarding service providers based upon the past data provided;
and
prioritizing service providers based upon the number of recently received service
opportunities.
4. The method of claim 1, wherein the service providers are pre-screened based on
the information they provide, such as service type, geographic region of operation,
service response and fulfillment time, preferred communication mechanism and
the types of transaction services for which they would like to be considered.

- 1 5. The method of claim 1, further comprising:
2 compiling quantitative ratings and qualitative reviews regarding a service provider
3 involved during a service transaction;
4 assigning a quality seal to the service provider based on the quantitative ratings
5 and qualitative reviews received from the consumers;
6 presenting the quality seal when subjective information regarding the service
7 provider is requested.
6. The method of claim 1, wherein the interactive interviews allow consumers to
narrow the alternatives that describe the service need, while the indications or
choices by the consumer lead them to a new set of alternatives and choices.
7. The method of claim 1, wherein the consumer needs may be presented to the
service providers, by way of a set of heterogeneous communication devices
depending upon preferences supplied by the service providers.
8. The method of claim 7, wherein the set heterogeneous communication devices
includes facsimile, pager, mobile phone, home phone, office phone, wireless
internet device, Interactive Voice Response (IVR) unit and email.
9. The method of claim 1, wherein the service providers may choose to submit a
quote for the consumer's needs, indicate a desire to be referred, or reject the task.
10. The method of claim 1, wherein the consumer after receiving service providers'
responses may then select from the pre-qualified service providers based upon one
or more objective and/or subjective factors associated with the pre-qualified
service providers.

1 11. The method of claim 10, wherein the objective and subjective factors may be
2 collected by the system and presented to the consumer along with the service
3 provider responses, and a database of consumer-generated service provider ratings
4 and/or reviews.

1 12. The method of claim 4, wherein the service providers are directed to a Service
2 Provider Enrollment Process (SPEP) for enrollment, after the service provider has
3 decided to enroll in the service.

4 13. The method of claim 12, further comprising:
5 capturing basic information on service providers;
6 collecting additional preference information to support the most effective CSR
7 Matching Process;
8 creating a unique service provider profile for each service provider;
9 providing service providers the option of personalizing the website home page to
10 meet their specific preferences;
11 notifying service providers of projects that have been submitted to the service for
12 which the service provider is eligible;
13 recognizing service providers upon return to their site.

1 14. The method of claim 13, wherein the basic information includes business name,
2 address, number of years in operation, number of employees, one or more service
3 interests, and credit information.

1 15. The method of claim 13, wherein the preference information includes one or more
2 service types, geographic region of operation, service expenditure size range,
3 service response and fulfillment time, and a preferred communication mechanism.

1 16. The method of claim 13, wherein the service provider profile can be updated from
2 time-to-time by service providers, by changing their preferences.

1 17. The method of claim 16, wherein the preference information further includes the
type of CSRs that the service providers are interested in seeing, such as quotes
versus referrals.

18. The method of claim 16, wherein the preferred communication mechanism may
be a pager, automated telephone, wireless internet device, IVR database, facsimile
and e-mail.

19. The method of claim 14, further comprising encouraging service providers to
identify potential service provider participants that can be contacted regarding the
service, launching communication and creating a Referred Prospect Profile (RPP).

1 20. The method of claim 19, where the RPP is used to support automated searches of
2 online and offline databases further enhancing the information contained in the
3 RPP, by importing search results into the RPP.

1 21. The method of claim 19, where the RPP may be used to:
2 launch a pre-formatted, semi-customizable communication via one of multiple
3 communication mechanisms, or
4 initiate a telemarketing or direct sales effort to the Referred Prospect.

1 22. The method of claim 1, wherein the Pre-Qualification Process includes:
2 reviewing objective criteria and capturing relevant information in the service
3 provider profile;
4 submitting a request for licensing confirmation to the relevant licensing body;
5 submitting a request for insurance coverage confirmation to the relevant insurance
6 company indicated through the SPEP and resident in the service provider
7 profile;
8 submitting a request for business credit status to one or more third-party agencies
9 based on information resident in the service provider profile;
10 submitting a request for legal and bankruptcy review to the relevant state's
11 Attorney General's Office or third-party information service bureau based
12 on information resident in the service provider profile;
13 submitting a request to the relevant agency or group, that capture negative
14 information based consumer feedback, based on information resident in
15 the service provider profile;
16 contacting references, when required from service providers, via email, physical
17 mail or telephone and questioned regarding the performance of a specific
18 service provider.

1 23. The method of claim 22, where the Pre-Qualification Process, where feasible, is
2 done automatically.

1 24. The method of claim 1, further comprising:
2 capturing basic information on consumers;
3 creating a unique consumer profile for each consumer;

4 providing consumers the option of personalizing the website home page to meet
5 their specific preferences;
6 developing an overall design theme for the website within the context of
7 metaphorical scheme, such as home;
8 providing complete listing of, but not limited to, participating service providers
9 with searching capability by categories, such as geography, service
10 category, rating score;
11 recognizing consumers upon return to their site;
12 determining consumer patterns with regards to subject interest and navigation,
13 such that anticipating preferences and presenting content are likely to be of
14 interest to the specific consumer.

1 25. The method of claim 24, wherein the basic information includes name, address,
2 email address, anticipated service needs, property type, and an indication of
3 geography.

1 26. The method of claim 24, further includes the option of updating Consumer Profile
2 from time-to-time by consumers, by changing their preferences.

1 27. The method of claim 1, further comprising:
2 consumers confirming completion of a service transaction based on a CSR; and
3 service providers confirming the completion of a service transaction, once the
4 consumer has already confirmed consummation of the service transaction;

1 28. The method of claim 27, further comprising:
2 consumers submitting the Consumer Feedback Form and the Rating & Review
3 Process; and

4 service providers submitting the input form rating their experience with the
5 service for a specific service transaction.

1 29. The method of claim 27, further comprising:
2 confirming the accuracy and validity of the transaction, once the consumer and the
3 service provider have confirmed a service transaction; and
4 “flagging” the situation where a CSR has received sufficient interest, but neither
5 the consumer nor the service provider has, upon Follow-Up, confirmed
6 consummating a service transaction.

1 30. A method of facilitating commerce between service providers and consumers
2 comprising:
3 providing a competitive environment in which consumers can select an
4 appropriate service provider based on full services quotes, objective
5 information and subjective consumer ratings and reviews relating to the
6 service providers;
7 uniting consumers and service providers by matching consumer needs to service
8 providers’ capabilities and identifying appropriate and pre-qualified
9 service providers; and
10 completing a full loop, by matching consumers to only those pre-qualified service
11 providers who have confirmed their interest in performing the requested
12 service.

1 31. The method of claim 30, further comprising guiding consumers through a
2 Consumer-driven Service Request (CSR) Process, where a consumer user desiring
3 to submit a service need for quote or referral may proceed through the CSR

process, which describes and defines their service need, and packages it in a meaningful way for the service providers.

32. The method of claim 31, wherein the CSR process may include interactive questions and answer interview or template process, which delivers a detailed description of the consumer's service need.

33. The method of claim 30, further comprising providing enrolled consumer users with status information for their active CSRs.

34. The method of claim 30, further comprising providing enrolled service providers with detailed information on available CSRs.

35. The method of claim 34, further comprising providing enrolled service providers information regarding past services referred or quoted through the service.

36. The method of claim 30, further comprising providing enrolled service providers with status information for their active CSRs.

37. A method comprising:
receiving an indication of a service category from a consumer;
developing a detailed description of the consumer's service needs by receiving
consumer input using interactive questions and answer interviews
generated by a decision tree based upon currently available information
about the consumer's service needs; and
soliciting quotes on behalf of the consumer from a plurality of pre-screened
service providers by packaging the consumer's service needs as a service
request and delivering the service request to each of the plurality of pre-

10 screened service providers, the service request including appropriately
11 descriptive and detailed information to enable service providers associated
12 with the service category to provide a firm quote;
13 compiling a list of pre-qualified service providers who have confirmed their
14 interest in meeting the consumer's service needs, by using the Intuitive
15 Predicting Method, where inferences are made based on the past data
16 provided by service providers, and by selecting service providers with the
17 least number of recent service opportunities.

38. The method of claim 37, further comprising:

receiving consumer input relating to the consumer's service need; and
guiding the consumer to the service category by presenting additional questions
and using information gathered to cross reference a knowledge
management database.

39. The method of claim 37, wherein the service request includes appropriate
measurements, product identifiers and desired solutions.

40. The method of claim 37, further comprising presenting the consumer with an
appropriate templated form for the consumer's service need.

41. The method of claim 37, further comprising presenting the consumer with one or
more visual images, such as photos or drawings, to facilitate development of a
correct service need description.

42. The method of claim 37, wherein consumers may indicate a preferred
communication mechanism for use by service providers.

1 43. The method of claim 37, wherein consumers may indicate deadline for completion
2 of their service need.

1 44. The method of claim 37, wherein consumers may indicate their preference of
2 quantitative rating factors, such as timeliness, price and cleanliness.

1 45. The method of claim 44, wherein quantitative rating factors are used to develop a
2 composite service provider rating for use in matching.

46. A method of matching consumers and service providers comprising:
service providers submitting basic information, including name, address, years in
operation, and preference information, including service types, geographic
region of operation and a preferred communication mechanism;
creating a unique service provider profile for each service provider;
consumers submitting the Consumer Service Request including basic information,
such as name, address and location of service, and preference information,
such as price, timeliness and communication mechanism;
creating a unique consumer profile for each consumer;
identifying a set of qualified service providers from a database of service
providers that are eligible to quote or be referred to a consumer based upon
the CSR;
presenting service providers with sufficiently descriptive and detailed consumer
data based upon the CSR;
service providers acknowledging the CSR and confirming their interest in
performing the service;

17 service providers responding with quote or referral, based on the information
18 included in the CSR;
19 compiling a list of pre-qualified service providers who have confirmed their
20 interest in meeting the consumer's service needs, by using the Intuitive
21 Predicting Method, where inferences are made based on the past data
22 provided by service providers;
23 modifying the list of service providers, by selecting service providers with the
24 least number of recent service opportunities;
25 consumers receiving a communication from commerce facilitator, confirming
26 receipt and summarizing the CSR, using the preferred communication
27 mechanism; and
28 consumers receiving the list of service providers, who have confirmed their
29 interest in performing the service, with requested quotes or referrals.

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47. The method of claim 46, further comprising providing an option for consumers to
save their CSR for adding information later, but prior to submittal.

1 48. The method of claim 46, wherein the communication may be triggered by the
2 process completion and include additional information, depending on the
3 anticipated time to complete the CSR Matching Process.

1 49. The method of claim 46, wherein the CSR contains certain information
2 components that may be used as key matching components, such price, timeliness,
3 service category, location and rating factors.

- 1 50. The method of claim 46, wherein the CSRs are matched against the appropriate
2 service provider profiles, using information components within the service
3 provider profile, as key matching components.
- 1 51. The method of claim 46, wherein the online communication mechanisms are, but
2 not limited to, e-mail, Internet website and wireless internet.
- 1 52. The method of claim 46, wherein e-mail, wireless internet and website are the
primary communication mechanism, unless otherwise stipulated via service
provider preferences.
53. The method of claim 46, wherein the offline communication mechanisms are, but
not limited to, pager, automated telephone, IVR database and facsimile.
54. The method of claim 46, further comprising:
analyzing submitted responses to ensure inclusion of all the required information;
prompting service providers to provide missing information.
- 1 55. The method of claim 46, further comprising presenting consumers with results,
2 upon completion of Service Provider Response Process, using their preferred
3 communication mechanism.
- 1 56. The method of claim 55, wherein the results include a summary of the service
2 providers eligible for referral for a specific CSR, where summary includes Rating
3 & Review summary.
- 1 57. The method of claim 55, further comprising providing options for consumers to:

2 request more detailed information on a specific service provider by potentially
3 linking to the service provider's website;
4 sort presentation order based on different variables, such as composite rating, cost,
5 service provider location;
6 indicate communication preferences including who will initiate communication,
7 i.e. the consumer or the service provider, the medium of communication to
8 be used and when the communication is to be initiated;
9 indicate their choice of service provider, in the event that quotes have been
10 submitted, rank their preferences, and consummate service transaction.

006750' 60642560

1 58. A machine-readable medium having stored thereon data representing sequences of
2 instructions, the sequences of instruction which, when executed by a processor,
3 cause the processor to perform the steps of:
4 establishing a database of pre-screened service providers, based on Pre-
5 Qualification Process;
6 extracting a description of the consumer's needs from a consumer using
7 interactive question and answer interviews appropriate for the desired task;
8 packaging and presenting consumer needs to multiple service providers that meet
9 a set of predetermined qualifications;
10 presenting service providers' responses to the consumer, once sufficient number
11 of responses are received.

1 59. A machine-readable medium having stored thereon data representing sequences of
2 instructions, the sequences of instruction which, when executed by a processor,
3 cause the processor to perform the steps of:
4 providing a competitive environment in which consumers can select an
5 appropriate service provider based on full services quotes, objective
6 information and subjective consumer ratings and reviews relating to the
7 service providers;
8 uniting consumers and service providers by matching consumer needs to service
9 providers' capabilities and identifying appropriate and pre-qualified
10 service providers; and
11 completing a full loop, by matching consumers to only those pre-qualified service
12 providers who have confirmed their interest in performing the requested
13 service.

1 60. A machine-readable medium having stored thereon data representing sequences of
2 instructions, the sequences of instruction which, when executed by a processor,
3 cause the processor to perform the steps of:
4 developing a detailed description of the consumer's service needs by receiving
5 consumer input using interactive questions and answer interviews
6 generated by a decision tree based upon currently available information
7 about the consumer's service needs; and
8 soliciting quotes on behalf of the consumer from a plurality of pre-screened
9 service providers by packaging the consumer's service needs as a service
10 request and delivering the service request to each of the plurality of pre-
11 screened service providers, the service request including appropriately
12 descriptive and detailed information to enable service providers associated
13 with the service category to provide a firm quote;
14 compiling a list of pre-qualified service providers who have confirmed their
15 interest in meeting the consumer's service needs, by using the Intuitive
16 Predicting Method, where inferences are made based on the past data
17 provided by service providers, and by selecting service providers with the
18 least number of recent service opportunities.

1 61. A machine-readable medium having stored thereon data representing sequences of
2 instructions, the sequences of instruction which, when executed by a processor,
3 cause the processor to perform the steps of:
4 service providers submitting basic information, including name, address, years in
5 operation, and preference information, including service types, geographic
6 region of operation and a preferred communication mechanism;

creating a unique service provider profile for each service provider;
consumers submitting the Consumer Service Request including basic information,
such as name, address and location of service, and preference information,
such as price, timeliness and communication mechanism;
creating a unique consumer profile for each consumer;
identifying a set of qualified service providers from a database of service
providers that are eligible to quote or be referred to a consumer based upon
the CSR;
presenting service providers with sufficiently descriptive and detailed consumer
data based upon the CSR;
service providers acknowledging the CSR and confirming their interest in
performing the service;
service providers responding with quote or referral, based on the information
included in the CSR;
compiling a list of pre-qualified service providers who have confirmed their
interest in meeting the consumer's service needs, by using the Intuitive
Predicting Method, where inferences are made based on the past data
provided by service providers;
modifying the list of service providers, by selecting service providers with the
least number of recent service opportunities;
consumers receiving a communication from commerce facilitator, confirming
receipt and summarizing the CSR, using the preferred communication
mechanism; and
consumers receiving the list of service providers, who have confirmed their
interest in performing the service, with requested quotes or referrals.

ABSTRACT OF THE DISCLOSURE

A method and apparatus are provided for matching ready-to-act consumers and pre-qualified service providers. According to one aspect of the present invention, the Internet is used to attempt to solve communications problems and to achieve efficiency in

5 Consumer-to-Business commerce transactions. Initially, a database of pre-qualified service providers is established. Then, a description of the consumer's needs may be extracted from a consumer using decision trees appropriate for the desired task.

Subsequently, the consumer needs are packaged and presented to multiple service providers that meet a set of predetermined qualifications. The consumer needs may be
10 presented, for example, by way of a set of heterogeneous communication devices depending upon preferences supplied by the service providers. For example, the set of heterogeneous communication devices may include facsimile, pager, mobile phone, home phone, office phone, Interactive Voice Response (IVR) unit, email, etc. The service providers may choose to submit a response for the consumer's needs or reject the task.

15 After a sufficient number of responses have been received from the pre-qualified service providers, they are presented to the consumer. The consumer may then select from the pre-qualified service providers based upon one or more objective and/or subjective factors associated with the pre-qualified service providers. For example, objective service provider qualification information may be presented to the consumer along with
20 the service provider responses. In addition, a database of consumer-generated service provider ratings and/or reviews may be maintained and made available for consumer queries.

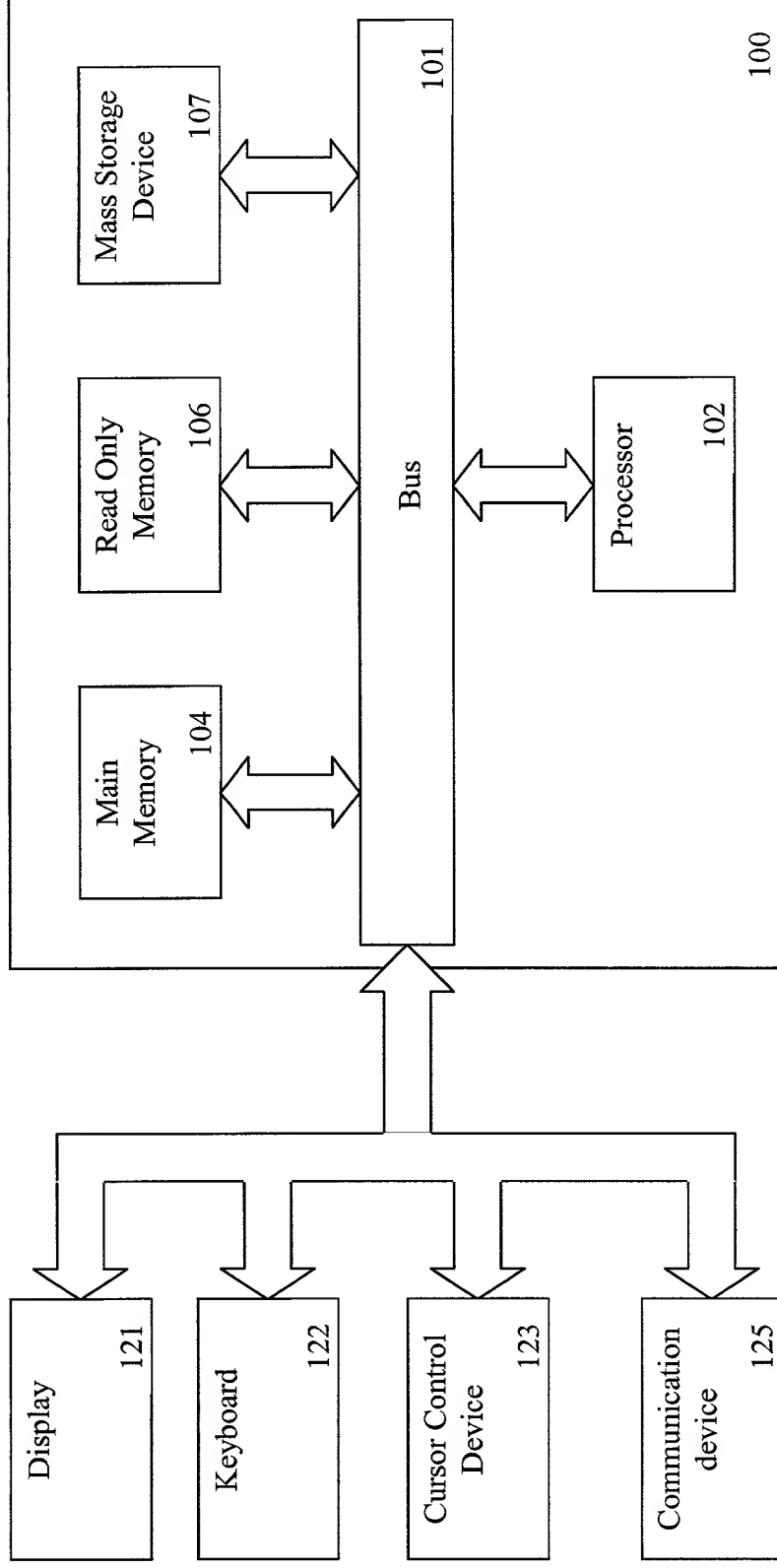


Figure 1

INTERNET-BASED COMMERCE
FACILITATOR PLATFORM

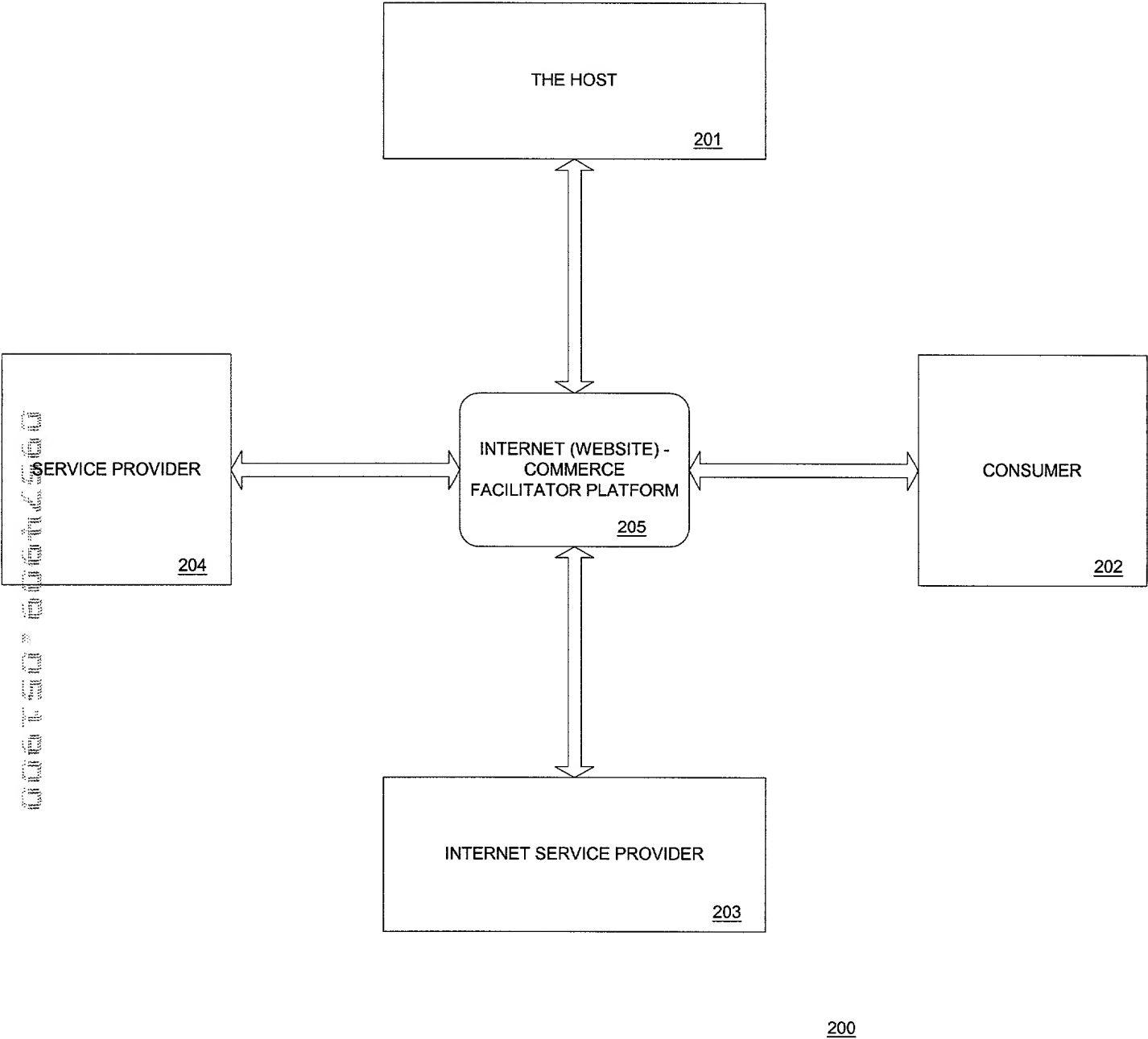


FIGURE 2

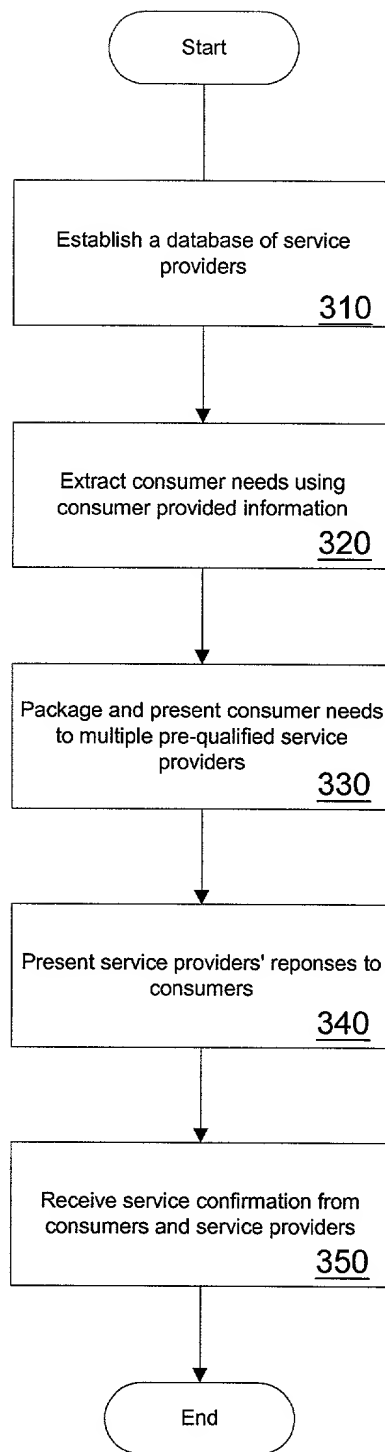


Figure 3

SERVICE PROVIDER ENROLLMENT PROCESS (SPEP)

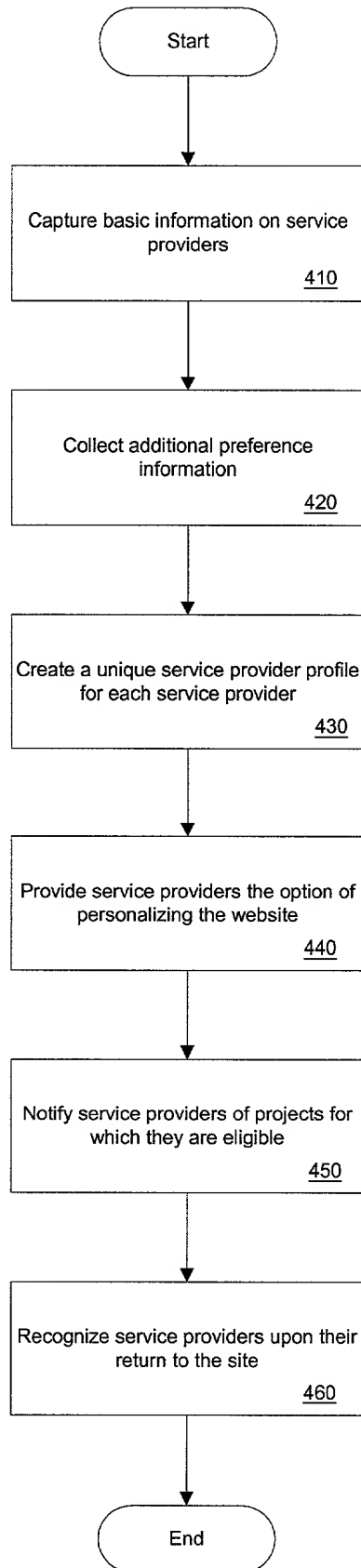


Figure 4

THE PRE-QUALIFICATION PROCESS

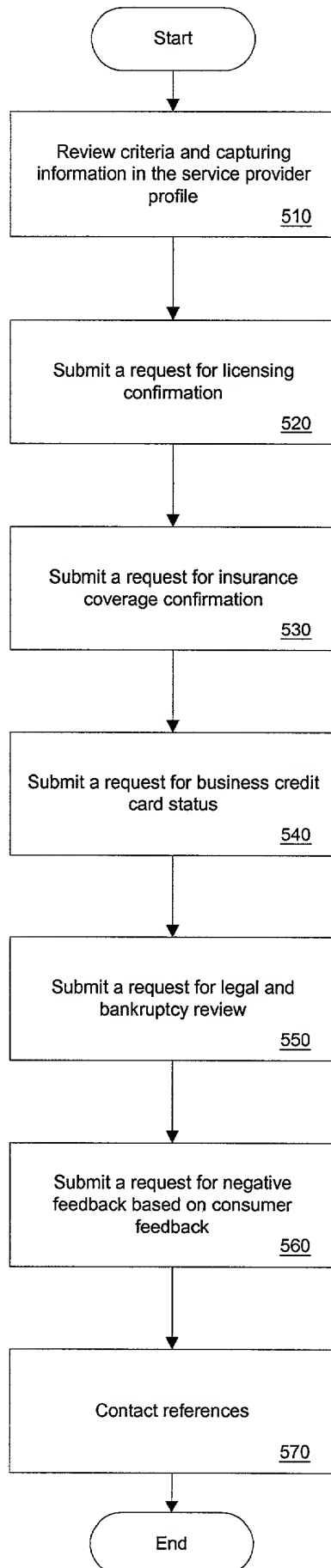
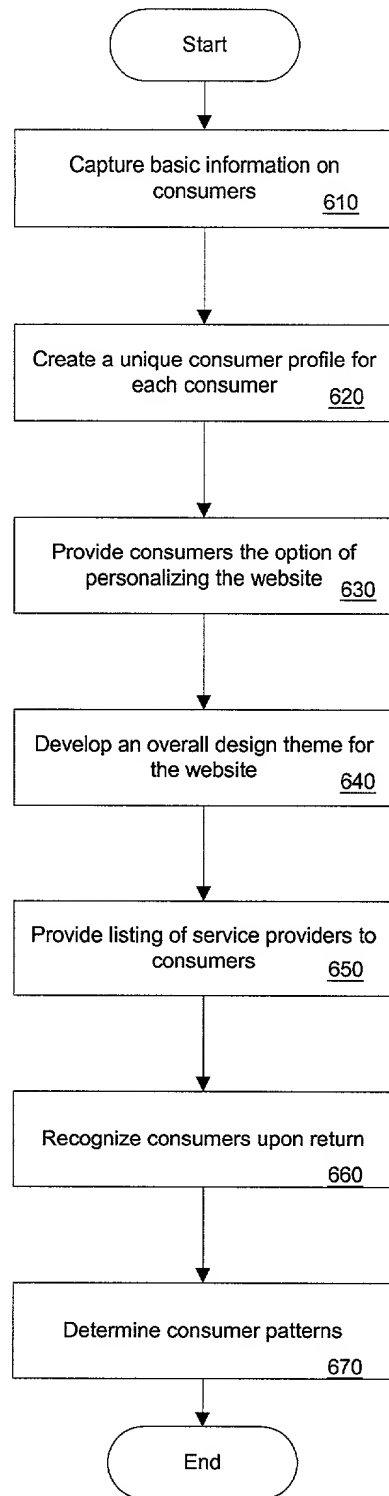


Figure 5

CONSUMER ENROLLMENT PROCESS (CEP)



600

Figure 6

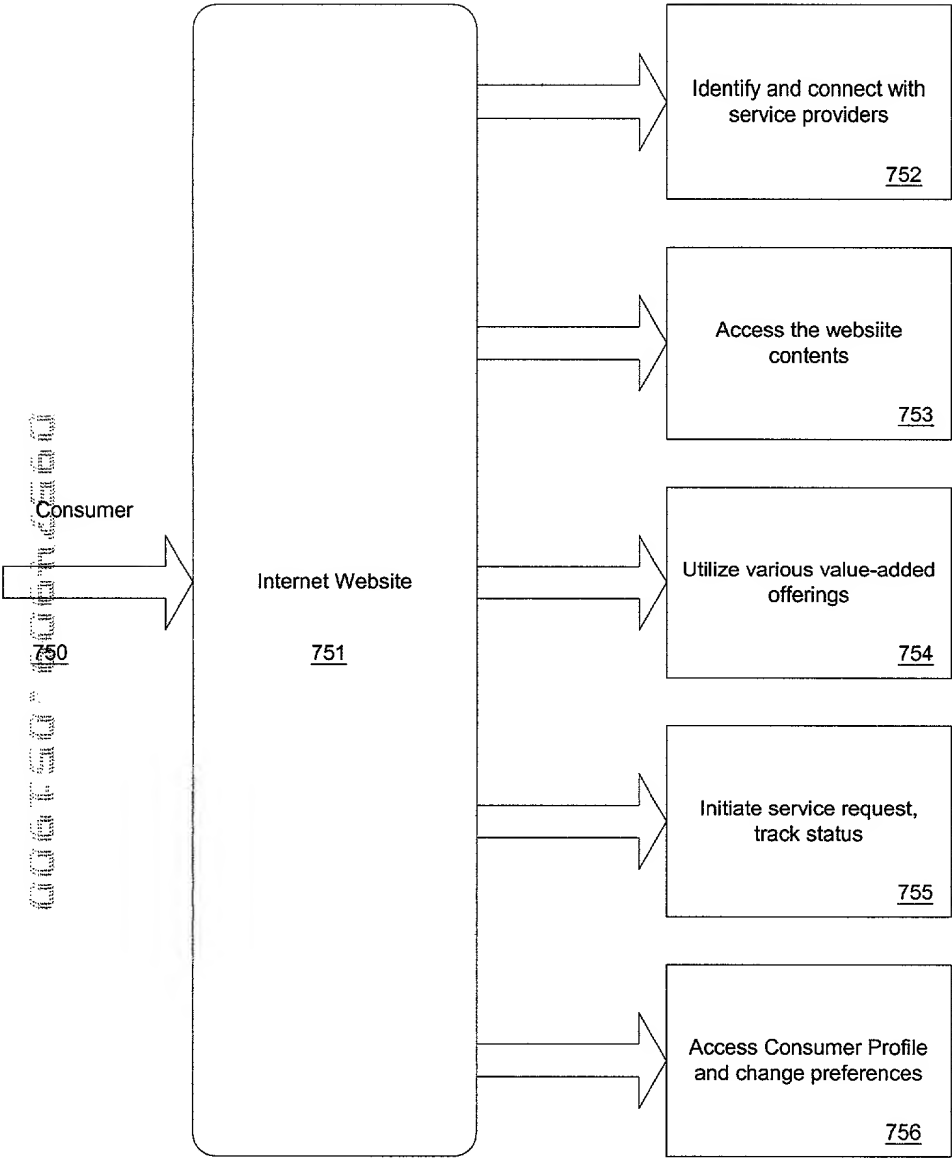


Figure 7a

Service Provider Access

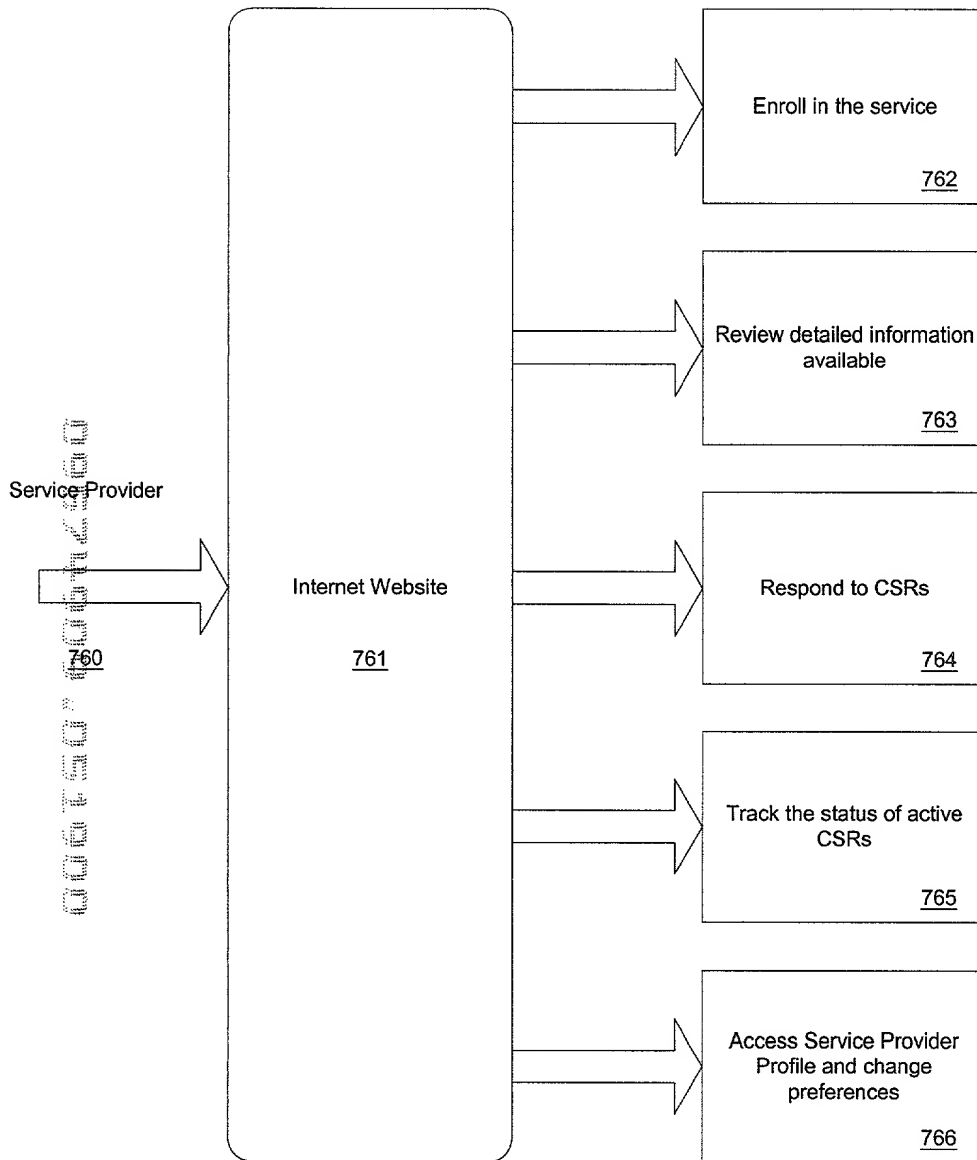


Figure 7b

Start

THE MATCHING PROCESS

Service providers submit basic information

801

Create a unique Service Provider Profile for each service provider

802

Consumers submit the Consumer Service Request including basic information

803

Create a unique consumer profile for each consumer

804

Identify a set of qualified service providers

805

Present service providers with consumer data based upon the CSR

806

Service providers acknowledge the CSR and confirm their interest in performing the service

807

Service providers responding with quote or referral

808

Compile a list of pre-qualified service providers who have indicated interest in performing the service, by inferences regarding service providers based upon the past data provided by service providers

809

Modify the list of service providers, by selecting service providers with the least number of recent service opportunities

810

Consumers receive a communication confirming receipt and summarizing the CSR, using preferred communication mechanism

811

Consumers receive a list of service providers, who have indicated interest in performing the service, with requested quotes and referrals

812

Stop

800

Figure 8

THE QUALITY SEAL

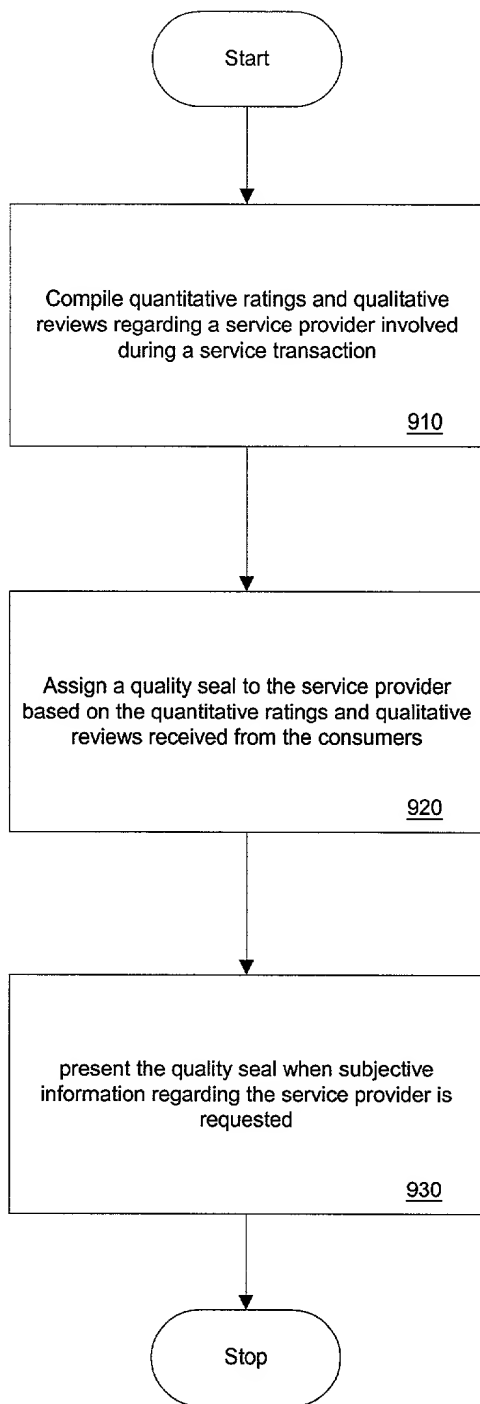


Figure 9

Services & Tools

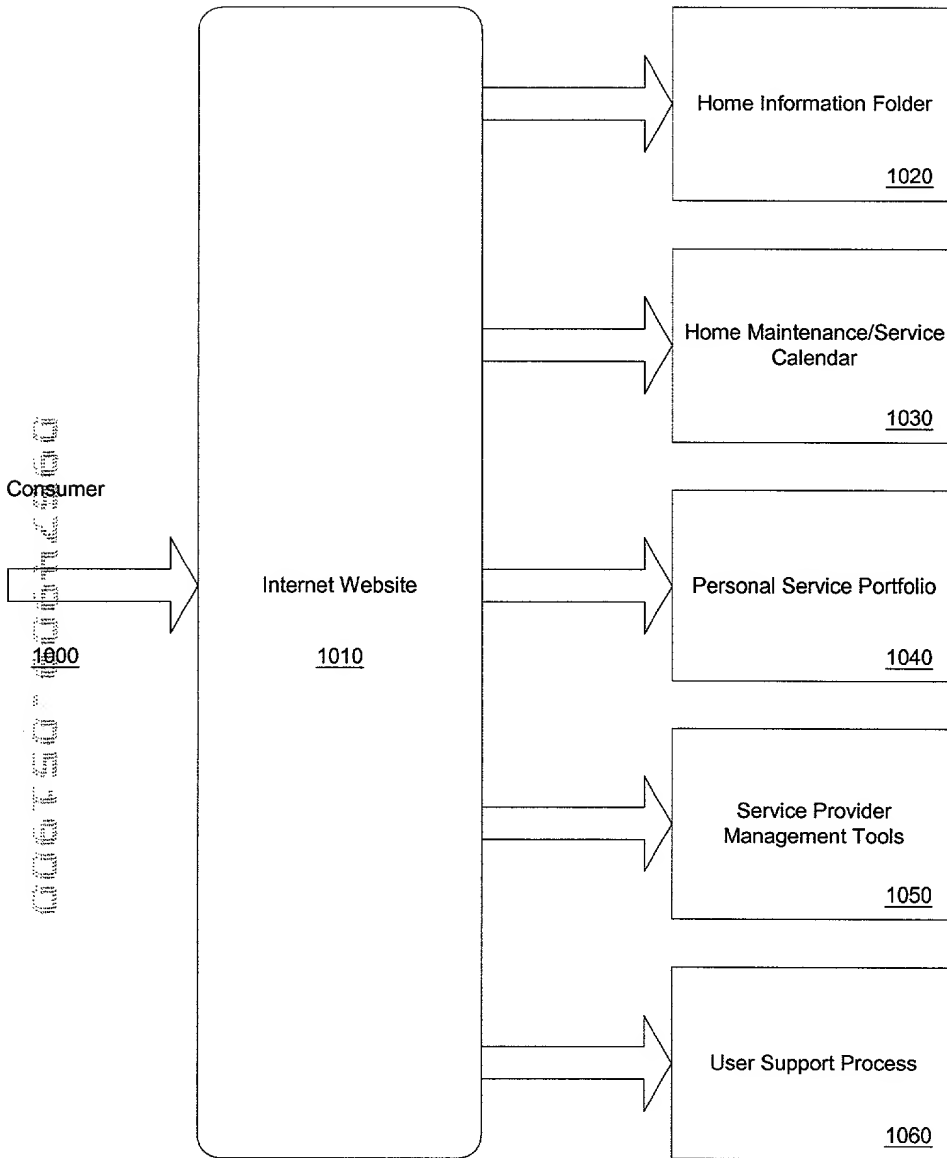


Figure 10

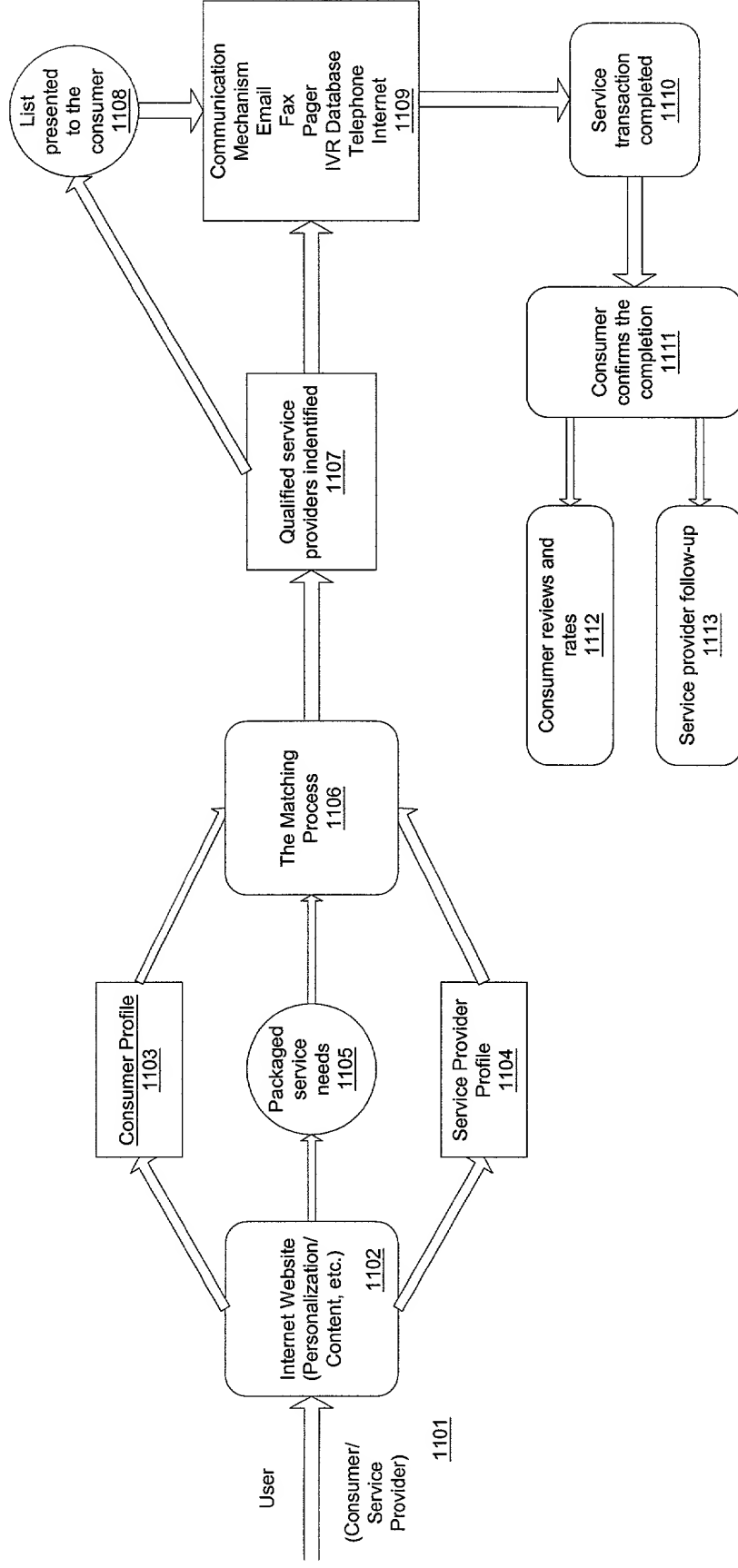


Figure 11

DECLARATION AND POWER OF ATTORNEY FOR PATENT APPLICATION

As a below named inventor, I hereby declare that:

My residence, post office address and citizenship are as stated below, next to my name.

I believe I am the original, first, and sole inventor (if only one name is listed below) or an original, first, and joint inventor (if plural names are listed below) of the subject matter which is claimed and for which a patent is sought on the invention entitled

Facilitating Commerce among Consumers and Service Providers by Matching Ready-to-Act Consumers and Pre-Qualified Service Providers

the specification of which

X is attached hereto.
_____ was filed on _____ as
United States Application Number _____
or PCT International Application Number _____
and was amended on _____
(if applicable)

I hereby state that I have reviewed and understand the contents of the above-identified specification, including the claim(s), as amended by any amendment referred to above. I do not know and do not believe that the claimed invention was ever known or used in the United States of America before my invention thereof, or patented or described in any printed publication in any country before my invention thereof or more than one year prior to this application, that the same was not in public use or on sale in the United States of America more than one year prior to this application, and that the invention has not been patented or made the subject of an inventor's certificate issued before the date of this application in any country foreign to the United States of America on an application filed by me or my legal representatives or assigns more than twelve months (for a utility patent application) or six months (for a design patent application) prior to this application.

I acknowledge the duty to disclose all information known to me to be material to patentability as defined in Title 37, Code of Federal Regulations, Section 1.56.

I hereby claim foreign priority benefits under Title 35, United States Code, Section 119(a)-(d), of any foreign application(s) for patent or inventor's certificate listed below and have also identified below any foreign application for patent or inventor's certificate having a filing date before that of the application on which priority is claimed:

Prior Foreign Application(s)

Priority
Claimed

_____ (Number)	_____ (Country)	_____ (Day/Month/Year Filed)	<u>Yes</u>	<u>No</u>
_____ (Number)	_____ (Country)	_____ (Day/Month/Year Filed)	<u>Yes</u>	<u>No</u>
_____ (Number)	_____ (Country)	_____ (Day/Month/Year Filed)	<u>Yes</u>	<u>No</u>

I hereby claim the benefit under title 35, United States Code, Section 119(e) of any United States provisional application(s) listed below:

<u>60/135,522</u> (Application Number)	<u>May 21, 1999</u> Filing Date
_____ (Application Number)	_____ Filing Date

I hereby claim the benefit under Title 35, United States Code, Section 120 of any United States application(s) listed below and, insofar as the subject matter of each of the claims of this application is not disclosed in the prior United States application in the manner provided by the first paragraph of Title 35, United States Code, Section 112, I acknowledge the duty to disclose all information known to me to be material to patentability as defined in Title 37, Code of Federal Regulations, Section 1.56 which became available between the filing date of the prior application and the national or PCT international filing date of this application:

_____ (Application Number)	_____ Filing Date	_____ (Status -- patented, pending, abandoned)
_____ (Application Number)	_____ Filing Date	_____ (Status -- patented, pending, abandoned)

I hereby appoint the persons listed on Appendix A hereto (which is incorporated by reference and a part of this document) as my respective patent attorneys and patent agents, with full power of substitution and revocation, to prosecute this application and to transact all business in the Patent and Trademark Office connected herewith.

Send correspondence to **Michael A. DeSanctis, BLAKELY, SOKOLOFF, TAYLOR & ZAFMAN LLP, 12400 Wilshire Boulevard 7th Floor, Los Angeles, California 90025** and direct telephone calls to (303) 740-1980.

I hereby declare that all statements made herein of my own knowledge are true and that all statements made on information and belief are believed to be true; and further that these statements were made with the knowledge that willful false statements and the like so made are punishable by fine or imprisonment, or both, under Section 1001 of Title 18 of the United States Code and that such willful false statements may jeopardize the validity of the application or any patent issued thereon.

Full Name of Sole/First Inventor Michael J. Beaudoin

Inventor's Signature _____ Date _____

Residence _____ (City, State) _____ Citizenship _____ (Country) _____

Post Office Address _____

Full Name of Second/Joint Inventor Rodney S. Rice

Inventor's Signature _____ Date _____

Residence _____ (City, State) _____ Citizenship _____ (Country) _____

Post Office Address _____

Full Name of Third/Joint Inventor _____

Inventor's Signature _____ Date _____

Residence _____ (City, State) _____ Citizenship _____ (Country) _____

Post Office Address _____

Full Name of Fourth/Joint Inventor _____

Inventor's Signature _____ Date _____

Residence _____ (City, State) _____ Citizenship _____ (Country) _____

Post Office Address _____

APPENDIX A

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APPENDIX B

Title 37, Code of Federal Regulations, Section 1.56 Duty to Disclose Information Material to Patentability

(a) A patent by its very nature is affected with a public interest. The public interest is best served, and the most effective patent examination occurs when, at the time an application is being examined, the Office is aware of and evaluates the teachings of all information material to patentability. Each individual associated with the filing and prosecution of a patent application has a duty of candor and good faith in dealing with the Office, which includes a duty to disclose to the Office all information known to that individual to be material to patentability as defined in this section. The duty to disclosure information exists with respect to each pending claim until the claim is cancelled or withdrawn from consideration, or the application becomes abandoned. Information material to the patentability of a claim that is cancelled or withdrawn from consideration need not be submitted if the information is not material to the patentability of any claim remaining under consideration in the application. There is no duty to submit information which is not material to the patentability of any existing claim. The duty to disclose all information known to be material to patentability is deemed to be satisfied if all information known to be material to patentability of any claim issued in a patent was cited by the Office or submitted to the Office in the manner prescribed by §§1.97(b)-(d) and 1.98. However, no patent will be granted on an application in connection with which fraud on the Office was practiced or attempted or the duty of disclosure was violated through bad faith or intentional misconduct. The Office encourages applicants to carefully examine:

- (1) Prior art cited in search reports of a foreign patent office in a counterpart application, and
 - (2) The closest information over which individuals associated with the filing or prosecution of a patent application believe any pending claim patentably defines, to make sure that any material information contained therein is disclosed to the Office.
- (b) Under this section, information is material to patentability when it is not cumulative to information already of record or being made or record in the application, and
- (1) It establishes, by itself or in combination with other information, a prima facie case of unpatentability of a claim; or
 - (2) It refutes, or is inconsistent with, a position the applicant takes in:
 - (i) Opposing an argument of unpatentability relied on by the Office, or
 - (ii) Asserting an argument of patentability.

A prima facie case of unpatentability is established when the information compels a conclusion that a claim is unpatentable under the preponderance of evidence, burden-of-proof standard, giving each term in the claim its broadest reasonable construction consistent with the specification, and before any consideration is given to evidence which may be submitted in an attempt to establish a contrary conclusion of patentability.

(c) Individuals associated with the filing or prosecution of a patent application within the meaning of this section are:

- (1) Each inventor named in the application;
 - (2) Each attorney or agent who prepares or prosecutes the application; and
 - (3) Every other person who is substantively involved in the preparation or prosecution of the application and who is associated with the inventor, with the assignee or with anyone to whom there is an obligation to assign the application.
- (d) Individuals other than the attorney, agent or inventor may comply with this section by disclosing information to the attorney, agent, or inventor.